REPORT TO THE MINISTER OF LABOUR

BY THE

ONTARIO PAY EQUITY COMMISSION

RESEARCH REPORT I

THE PAY EQUITY COMMISSION

Ontario

PAY EQUITY IN PREDOMINANTLY FEMALE ESTABLISHMENTS: TOURISM SECTOR

PREPARED FOR THE
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THE VIEWS EXPRESSED HEREIN ARE THOSE OF THE AUTHOR AND DO NOT NECESSARILY REFLECT THOSE OF THE GOVERNMENT OF ONTARIO

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* All or most of the industry is predominantly female.

OVERVIEW OF THE STUDY

The purpose of this study was to provide a qualitative review of industries within tourism which predominantly employ female workers. Beyond this primary focus, information was requested on tourism industries which may be of concern regarding general pay equity issues that would not be served under the existing Pay Equity Legislation.

The first section of this report addresses tourism as a total industry. This is to clarify certain issues pertaining to all tourism industries and to provide a background for discussions of employment, economic and future trend issues in the specific industries selected for a more in-depth analysis. From this perspective of the total industry, decisions on the direction of the rest of the study were made, which industries to investigate and what issues to pursue in connection with Pay Equity and the particular industries.

Selected sectors of the tourism industry were studied and are profiled in order of their relative importance to the central purpose of this study. In other words, the most predominantly female industries are presented first, followed by less predominantly female industries, or ones in which there are distinctly female job classes.

The general methodology of the study is outlined throughout the paper as decisions on what avenues of investigation looked more or less promising were integral parts of the description of the industries. An overview of the full research plan is provided in the last section of the study.

A large amount of data was collected as a basis of this study. The most pertinent and interesting information derived from this data is provided in the Appendices along with samples of the questionnaires used in some of the interviews.There is also a section in the Appendix reviewing some of the considered options for addressing Pay Equity within the Tourism Industry which arose from this study.

INTRODUCTION TO TOURISM

Tourism is generally described as a service industry and, along with other service industries, is expanding rapidly in employment and economic impact. Tourism Canada estimated in 1987 that "Tourism has an employment growth rate much higher than other industrial sectors such as agriculture, construction, transport and trade" (Canadian Tourism in Review, presentation to the Advisory Council of the Canadian Tourism Research Institute). A study by the Ministry of Tourism and Recreation on The Economic Impact of Tourism in Ontario estimated that the income generated in response to total tourism expenditures in Ontario amounted to 10.3 billion, or about 5.8 per cent of the gross provincial product and 6.6 per cent of personal income in Ontario in 1986. A study of the service sector in Ontario indicated that tourism is Ontario's second largest export industry, after Motor Vehicles, Auto Parts and Accessories.

The outlook for the future is that employment in tourism is expected to grow at more than five per cent a year in this decade and even faster in the 1990's.(Ontario Study of the Service Sector, 1986)

The problem in studying employment in tourism has been to identify which industries, associations or government agencies can be specifically defined as tourism businesses. The statistics drawn from federal studies of tourism (as above) reflect a very broad definition of the industries and include information from what they term direct, indirect and induced employment effects of the industry. This is an important distinction because it means that the statistics are not as directly related to what many people would consider 'the tourism industry' as one might think.

The 'direct' tourism industries included in federal studies are profiled in Appendix 1, Tables 2 and 3, with information on the Standard Industrial Classifications (SIC) and the female and male employment percentages within each industry. A summary of the categories considered direct tourism industries are as follows:

Accomodation	Transportation
Food & Beverage Service	Travel Agencies
Tour Companies	Souvenirs
Traveller's Cheques	Attractions
Camping	Fishing & Hunting Equipment
Luggage	Car Rentals

A 1982 study by the Ontario Ministry of Tourism and Recreation studied the 'direct' effects

of tourism by looking at:

Accomodation and Food,
Retail Trade,
Transportation, and
Amusement and Recreation.

A fuller list of the industries included in the provincial study with information on the number of Canadian-owned and Foreign-owned industries was excerpted from the provincial study and can be found in Appendix 1, Table III.

Beyond those industries determined as 'directly' tourism-related, both the province and federal tourism departments identify industries which they term as being related to tourism in an "indirect" or "induced" manner. 'Indirect' employment results from the creation of jobs in industries which supply the tourism sector, eg. food suppliers to restaurants. 'Induced' employment results from jobs generated in the economy as a result of expenditure by households and businesses earning income in tourism and its supplier industries.

A review of these broad parameters and their attendant statistics was helpful in deciding where to focus the time and energy for this study. The industries profiled were considered worth studying on the basis of information that suggested they might be female predominant.

GOVERNMENT INVOLVEMENT

It should be noted that until quite recently most studies of tourism focussed on the demand side of the industries, or the number of tourists travelling through the countries and the services they bought. However there has recently been a great flurry of activity to study all factors of the industry (the Canadian Tourism Research Institute was set up as part of the Conference Board of Canada), to create joint government-industry task forces, and to fund expansion of the industry. It is hoped that such activities will increase tourist travel and thus employment in tourist industries.

A brief listing of assistance currently received by Ontario tourism industries will illustrate the scope of government funding and provide an interesting backdrop for discussion of pay equity.

- Federal assistance is available through the Small Business Loans Act, the Federal Business Development Bank, training grants from Canada Employment and Immigration.

- The Trade and Convention Program is a costing sharing program amongst the thre levels of government to fund the building of such centres as the Metropolitan Toronto Convention Centre ($19 million).

- The Ministry of Tourism and Recreation has a budget of $186 million for financial assistance to the industry, administered by the Ontario Development Corporation.

- The Tourism Redevelopment Incentive Program (TRIP) provides loan gaurantees for up to a million dollars and subsidizes interest rates for new or improved establishments.

The list goes on. Seven more assistance projects are outlined by the Service Sector Study and these cover the intricate system of tri-government level funding of Cultural Industries and tourist associations.

Further discussion of provincial funding of tourism industries will be provided in later sections of this report where appropriate, but it is important to understand at the outset the complicated and overlapping nature of the private and public sector in many areas of tourism. Comparisons among industries will have to take into account amount and type of funding which forms the basis of many non-profit tourism businesses, and whose wages are set on both factors of funding availability and market supply. For example, the pay scales at the Royal Ontario Museum are determined in quite a different manner from that of the Grey County Museum, not only because of the different funding base but also because of union involvement (or lack of it), and of the average wage rates in the two centres.

TRAVEL INDUSTRY

The travel industry could be widely described as including all services to travellers. Federally regulated industries such as air, train and boat travel were not investigated as they are outside the scope of this study. Statistical analysis of several areas (bus, taxi and other transportation) indicated that such industries were not pertinent to this study as they were predominantly male or had close to equal proportions of male and female staff. Preliminary investigation (two personal interviews) were conducted into the car rental industry, but further study was abandoned as such a line of inquiry was not felt to be useful to the study. From this overview of the industry, travel agency employees were found to be predominantly female andlow paid and, therefore, a more in-depth study was carried out of this industry.

1. TRAVEL AGENCIES

SCOPE OF THE INDUSTRY

The size of the travel agency industry in Ontario is difficult to estimate as there is no SIC code specifically for travel agencies and related establishments. The SIC70 and 80 codes of 517 are entitled Miscellaneous Services Incidental to Transport, and travel agents are subsumed under this category along with several other industries. The SOC code, 4193, is for travel agents but also for reservation, ticket and travel clerks which would encompass those working for air, bus and train businesses. The 1981 census data shows there were 9,735 people working in these occupations in Ontario, of which 69% were female.

The travel registrar for Ontario reports that there are **3,198 registered wholesalers and retailers in the travel agency business in 1988**. Of this number approximately 500 are wholesalers, and about 400 of these have dual registration as retailers and wholesalers. Thus the number of 'real' retailers would be about 2,298. This does not, however, give the whole picture. A travel agency must have one employee registered with the province but may have additional staff (average estimates run from 3 - 4 per agency) all of whom may not be registered. The Canadian Travel Press has a Canadian circulation of 17,000, of which 13 to 14,000 are travel agents and it is **estimated that** 40% are from Ontario. From these two pieces of information, it is likely that there are in the range of **5,500 to 6,500 employed in travel agencies in Ontario.**

GENDER PREDOMINANCE

Overall, it is estimated (by travel editors and provincial regulators) that 85% of the people working in travel agencies are female. Interviews with retail and wholesale operations found the ratio to be closer to 90 to 95% female. One interviewee reported that there used to be more men than women in this industry but now it was totally the opposite in female to male ratio because: 1) the prestige had been take out of the job, 2) there were less travel 'deals', and 3) the wages were so low.

When asked why the industry attracted so many female workers some of the responses were:

- "It's seen as a glamorous business with lots of travel."
- "Lots of those who don't make it to be a flight attendant view this as the next best thing."
- "It's a controlled environment - regular hours and comfortable working conditions."
- "Many women use it as a stopgap between school and marriage, or between school and deciding what else to do."
- "Women are not as assertive as men about asking for more money and they will accept lower wages."

TYPE OF TRAVEL AGENCIES

Travel agencies are divided into the broad categories of retail and wholesale agencies. There are large and small agencies within both of these categories. Wholesale agencies put together packages to destinations which include transportation and accommodation and then sell these packages to the retailers. Retailers buy a number of packages from the wholesalers which they hope to sell to individual or corporate clients, or they can deal directly with suppliers (airlines, hotels, etc.) to arrange travel for their clients.

Travel is further divided between outgoing and incoming travel, of which travel agencies deal primarily with outgoing traffic, and thus are considered an 'export' industry.

A separately defined group of people who work as travel agents, but are not employed in the retail or wholesale industry are those who arrange travel from within a corporation. The Toronto Business Travel Association has over 200 members, most of whom are on staff to

companies like Bell Canada, Stelco and IBM (the total list was confidential). These people generally earn much higher wages than those in independent agencies because the wages are tied to the corporation, not to the commission made through travel arrangements. There are also some shared arrangements whereby an independent agency will supply a staffperson to a particular company, or where companies make their own travel arrangements but have their bookings completed by a specific independent agency.

FINANCIAL BASIS

Travel agencies work on a very small profit margin and this is seen as the primary reason for low wages in the industry. A sample of the commissions available to agencies and their sources are as follows:

- Airlines commission to agents — 8.25% for domestic flights,
  10% for transborder flights,
  9% for international flights,
  5% for charters.
- Hotels and car rental commissions - 10%.

Wholesale agencies will have an even smaller profit margin, about 5 to 6%, but make a greater profit than retailers because the the wholesalers buy in such large quantities. Also, wholesale operations tend to be large (budget and staff) and are able to afford the management and automation skills necessary to be efficient and cost effective in their overall business management.

Small independent retail operations are considered to be high risk because of the small profit margin and the competition from discounting retail chains and increased number of independent retailers. One interviewee estimated there to be 1,000 travel agencies in Ontario at any one time but that there were ten openings and ten closings every day.

The major costs incurred in the travel agency business are estimated to be salaries and benefits (40 to 57%), office overhead (about 30%), and promotion and marketing (5 to 15%). A survey conducted by Travelweek (a travel publication) in January of 1986 reported that 80% of retail agencies were showing no profit at all. Of those who generated a profit, the majority netted 1 to 2%, with some exceptional companies showing a 3% profit.

People in the travel business believe the following are the reasons for business failures :

- Poor management,

- Poor location,
- Discounting too much,
- Small profit margin - can't carry outstanding receivable too long,
- Competition from chains,
- "Sleazy operators" who get in for quick money and have no knowledge of the industry and poor human resource and money management skills.

Government funding plays no part in this industry, aside from supporting the building of attractions, because it is not seen as good for the country to support an industry which takes money out of the country.

GENDER DISTRIBUTION IN OCCUPATIONS

With **estimates of 80 to 95% predominance of women** in this industry it is easier to outline the occupations where women are not, or those predominated by men, than where women predominate. In the retail agencies, if men are anywhere, they are the owners or managers. Many ethnically-based agencies have men as owners/ managers and only occasionally as travel consultants. This is usually true for cultures from the Mediterranean or Middle East areas, but not true for Chinese agencies. They are predominantly female-staffed.

In the large wholesale agencies, the owners are all men but there has been a great increase in the number of senior women in these organizations over the last few years. It is estimated that there is at least one women in the top executive rank in each of the major wholesale agencies. An interesting note on gender and ethnicity is that the presidents of all major Ontario wholesalers are male and from Britain (and strongly anti-government business involvement). Most owners of small wholesale operations are female.

The rise in female owners and executives in travel agencies reflects the overall rise in women in this industry. The pool of experience from which to draw people for promotion is almost entirely female.

SALARIES AND WORKING CONDITIONS

ACTA (The Alliance of Canadian Travel Associations) and the Canadian Travel Courrier conducted an industry-wide survey of salaries in Canada in 1987. The specific results of the survey were not accessible (guarded as confidential to the industry) but the most salient parts were

excerpted in an article of the Canadian Travel Courrier, October, 1987. The most pertinent findings of this survey for Ontario are highlighted below.

- Average annual salaries: for beginners - $11,898.
  after one year - $13,990.
  after five years - $18,358.

- Some of the lowest salaries were paid by a chain agency in Toronto, while some of the highest were at an independent agency in British Columbia in a town of 12,000 people.

- The retail chains offer more benefits such as medical insurance, pension plans, regular fam (familiarization) trips and training.

- Suppliers to the industry (tour operators, car rentals,

- 37% of travel counsellors receive salary only, while another 37% receive salary plus commission.

- 59% of retailers have outside sales reps; 85% of these reps are paid commission only, 10% pay salary and commission, and 4% give only free or reduced rate trips.

- The number one reason for quitting was relocation to another city or province. The next most common reason (24%) was low salaries, lack of benefits and little chance of advancement in small agencies. Twenty per cent cited marriage or maternity leave as reasons for leaving.

From the interviews conducted for the present study, the ACTA survey results seem pretty accurate. Small agencies in Toronto pay between $12,000. and $15,000. for junior counsellors, $15,000. to 17,000 for senior counsellors and $18,000. to $30,000. for managers. There are notable exceptions however where small, well-placed agencies with strong corporate accounts pay $25,000. to junior counsellors, $32,000. to senior counsellors and are estimated to make more than $40,000. for their owner/managers. At the other extreme, a large wholesaler reported that 70% of his staff were paid only $1.00 to $3.00 above minimum wage.

A great problem in this industry is the accepted practise of not paying beginning workers, or paying low wages with promises of free trips at a later date. The following quote from the

ACTA survey illustrates this practise: "We hired a new employee; she had just finished school training. Our policy is to practice for 60 days *without pay* and afterwards the wage will depend on her ability to do the work". The Ontario Registrar for Travel expressed serious concerns about the widespread practice of unscrupulous owners taking advantage of young people in this manner. It was hoped that with new legislation (the currant travel legislation is under review) some standards about training and certification will be set and that this might weed out the less desirable elements.

FULL-TIME / PART-TIME

All agencies interviewed estimated that 95 to 100% of their staff worked full-time. Associations and educational institutions estimated full-time travel workers were more in the range of 80 to 85% of an agency staff. People in the industry for many years consider both of these estimates much too high, because of the ' hidden' part-time sales force.

Anyone can sell travel, as long as it is at some point funnelled through an agency. Thus there are many 'sales reps' who sell to friends or on a regular or irregular basis, and are paid by commission or reduced rates on travel. Some of these earnings will not be reported as income tax and therefore it is impossible to estimate the size or scope of this part-time market. Some larger retailers are actively advertising in the newspapers for people to do this type of part-time sales as it is a way to increase sales but not incurr more labour costs.

TRAINING AND EDUCATION

There are courses on the travel industry at both community colleges and through private vocational institutions. It does not seem to matter to salary or placement where training was obtained but it is more expensive and shorter to go to a private institutions (about $3,000. and 6 months) than to a college (about $2,000. and 6 semesters - 2 to 3 years). There were 40 graduates from the Seneca College Tourist Industry Administration Course in 1986 who entered full-time related work and made starting salaries of between $11,000. and $16,000.

Certification is granted by the CITC, Canadian Institute for Travel Counsellors, after a written exam, but this certification is not necessary to work in a travel agency. For the agency to be registered however, and thus allowed to conduct business, one person in the agency must have their CTC, Certified Travel Counsellor designation, or "equivalent credentials". The Travel Registrar has discretionary powers to accept or reject an application for an agency based on their experience in the travel industry and past credit history. In Ontario, the ACTA survey found that

29% of agencies surveyed said they paid higher wages to workers with their CTC, while 71% said they did not.

Currently, the CTC is a 'nice but not necessary' training for working in the travel business.It is expected that if legislation is passed to require travel counsellors to have their CTC, the occupational profile of most agencies will change to one of more clerical staff to handle administrative details (at the lowest wages) and travel counsellors to focus on counselling clients with an attendent increase in pay and status for the counsellors.

BENEFITS AND BONUSES

The ACTA survey reported that training and medical benefits are the major benefits offered by Canadian travel agencies.

- 62 % reported that they pay for professional training and seminars,
- 53% of retailers pay all or part of premiums for medical insurance,
- 36% provide dental coverage,
- 30% subsidize travel,
- 23% offer drug plans,
- 21% have life insurance plans,
- 12% have pension plans,
- 12% offer disability insurance,
- 4% provide subsidized uniforms, and
- 4% pay fees for membership into industry associations.

As an industry, it can be seen that not only are the wages low but the benefits are also very low in comparison with other industries, although comparable to small business enterprises. There is a notable ommission, for a female-predominated industry, of any mention of daycare facilities or subsidies, or extended maternity benefits. An observation is that it would be difficult, if not impossible, for a single parent to survive on the mix of wages and benefits offered in this industry.

One of the greatest perquisites offered by travel agencies are free trips. Wholesalers and suppliers offer "fam" or familiarization trips to retailers to aquaint them with the destinations they are selling to their clients. Several years ago these trips were very cheap (only government taxes needed to be paid by the traveller) and were excuses for long parties. Nowadays, they require more financial investment and more personal time spent touring the facilities. The ACTA survey found that 85% of fam trips are taken on company time and only 67% of agencies pay for trip costs.

There is a wide mix of arrangements for splitting costs and company vs private time. But these are the "extra's" which lure young people into the business, and by which owners pay some staff in order to lower labour costs.

UNIONIZATION

This study could find no unionization in the travel agency business.

FUTURE TRENDS

All parties interviewed pointed to a decrease in the number of small independent retailers due to competition in marketing and discounting from the chains and new options like toll-free calling to telephone travel counsellors, and membership organizations where bulk buys will make wholesale rates available to the member/consumer.

New legislation requiring stricter experience and accreditation guidelines for counsellors and agents should reduce the high numbers of unskilled entry level positions and raise the salaries of travel counsellors. These changes may also introduce a new lowest occupational level in a travel agency in the form of secretarial and clerical support to counsellors. While sound management is reputed to make travel agencies a worthwhile financial venture, it is still unclear whether there will be enough profit margin to support increased wages for counsellors plus additional wages for administrative support. Those who have been succussfully in the business for many years feel strongly that a well-managed operation can pay decent wages and turn a good profit.

Several of those interviewed believed that there was plenty of room for increased automation in travel planning and ticketing and that this would help the travel business catch up with the rest of the business world in terms of technology.

There were mixed feelings about the impact of free trade in this industry. Some felt it would not have any impact, while others thought the travel business would benefit from increased Canada-U.S. business travel.

PAY EQUITY

From all accounts, the travel agency industry is a clear case of systemic bias in that it survives on the low wages, poor benefits and little advancement accepted by the predominantly

survives on the low wages, poor benefits and little advancement accepted by the predominantly female staff it employs. There is no move to increase wages as there are plenty of willing women, both of the young-out-of-school and mature-after-the-family-has-grown varieties. The options for making more money or getting more responsibility require them to start up their own agency (expensive), move up in the wholesale industry (limited but better opportunities than elsewhere), move in-house as a corporate travel counsellor (very limited but good jobs), or to get into another line of business.

The major problems for linking pay equity to this industry through the currant legislation are that most of the agencies are very small (2 to 5 employees), and there are no male comparators. The larger agencies will be encompassed because of their size but there will be no male comparisons below the senior executive ranks.

No mention of job descriptions or job evaluations was made in the the ACTA national survey. The small companies usually do not have job descriptions because the duties are seen as obvious and it was unclear whether the ones that the larger companies had included categories that would make them useful as a basis for job evaluations.

2. TOURISM ASSOCIATIONS

SCOPE OF THE INDUSTRY

This section profiles the public and private establishments whose purpose it is to promote tourism either for a particular geographic region or for a particular industry. This is not a clearly defined sector of the workforce, either by a SIC (Standard Industry Classification) or by a SOC (Standard Occupational Classification) but rather was described through the qualitative research of this study. The SIC codes were updated and expanded in 1980 to four digits and in this system there are codes for industries that might shed some light on employment in this industry.

- Provincial Recreation and Culture Administration (8264),
- Local Government Recreation and Culture Administration (8364),
- Business Associations (982), and
- Professional Membership Associations.

No data could be found to indicate the numbers of people, establishments or employees working in these areas in Ontario. An outline of the type of organizations included in this sector

gives a good indication of the scope and nature of the pseudo-industry. The following associations are members of the larger umbrella organization, Tourism Ontario, whose function it is to lobby the government in support of the interests of these groups.

- Accommodation Motel Ontario Association,
- Attractions Ontario,
- Northern Ontario Tourist Outfitters Association,
- Ontario Association of Convention Bureaux,
- Ontario Hotel and Motel Association,
- Ontario Motor Coach Association,
- Ontario Private Campground Association,
- Ontario Restaurant and Foodservices Association,
- Ontario Ski Resorts Association,
- 12 Ontario Travel Associations.

While it was not found to be an exactly defined industry, some comment was considered necessary because of the predominace of women working in these associations.

INDUSTRY STRUCTURE

The Province has been divided (by the Ministry of Tourism and Recreation) into 12 Travel Association Regions which act "at arms length" from the government as umbrella organizations for tourism industries and regional tourism associations in that area. They are consider private, non-profit organizations with Boards of Directors composed of local representatives of industry and government. They receive $35,000. a year for administration from Tourism and Recreation but are considered a client of the province, not an agency, and so there are no Memorandums of Understanding exchanged or any influence of the government on financial, management or human resource policies.

Within each region there will be other tourism associations such as a Tourism and Convention Bureau connected local Chamber of Commerce, county and city tourism associations or associations built around particular industries or attractions.

GENDER PREDOMINANCE, OCCUPATIONAL CATEGORIES AND SALARIES

As industry and public associations were contacted to provide some insight as umbrella organizations to specific tourism industries, it became clear that the associations themselves were very similar in their structure, staffing and pay practises. They were, for the most part, small (2 to 10 full-time employees and some part-time seasonal), were predominantly female and the wages were in the $15,000 to 25,000 range except for larger organizations. The managerial staff were primarily male, and it was only at this occupational level that salaries occasionally climbed to as high as $120,000.

An example of salaries and gender of job incumbents in a Tourism Association Region office is as follows:

- General Manager (male) $36,400.
- Executive Assistant (female) 20,800.
- Bookkeeper/Receptionist 19,500.

Industry associations were more difficult to get salary data for, but the indication received was that they were in the same range as the TAP noted above but there may be a greater discrepancy between the manager and support staff wages, or between the male and female staff. An umbrella organization for other industry associations had a 5 to 1 female to male employee ratio with the male making $55,000., two women making $18,000, one at $22,000. and one at $35,000.

The job functions of most of the staff in these associations were clerical or administrative. The purpose of most associations is to communicate information to or among its members (example wage surveys), or to coordinate marketing or lobbying efforts for a particular industry (eg. Ski Resorts) or a particular geographic region (eg. Georgian Lakelands). The large organizations had accounting, sales, public relations and marketing staff. In the smaller organization, which seemed to be in the majority, there was a manager who did promotion, marketing, accounting and management, and assistant or administrative staff who also did sales, marketing, bookkeeping and the many clerical duties needed to communicate with a memberships and marketing organization.

No information was gathered to suggest that there are many job descriptions in the small associations. The government affiliated associations have them as a matter of course.

FINANCIAL BASE

Most of the tourism associations are non-profit organizations supported by memberships, advertising in their publications or government funding. As mentioned previously the 12 OTAP's (Ontario Tourist Association Program) receive annual operating grants plus they may receive up to $110,000 for cooperative marketing projects based on a matching plan with local government and industries -- the government will match the funds provided by local contributors.

A city convention and visitor's association will receive funding from a wide variety of sources. The following is an example of such a budget:

• City	$20,000.
• Chamber of Commerce	50,750.
• Special Festival Committee	6,000.
• Waterfront Committee	10,000.
• Industrial Committee	2,000.
• Business Improvement Committee*	9,250.
• Economic Development Committee*	5,000.
• Membership	15,000.
• Cooperative Printing	15,000.
• Cooperative Marketing	4,000.
TOTAL	$137,120.

* also city grants.

For this association there were two staff, both full-time and female. The manager earned $28,000. per annum (an increase from $15,600 two years ago) and the secretary earned $18,600. This is an example of an exceptionally well-funded association and fairly highly paid staff.

UNIONIZATION

There is no unionization in this industry.

FUTURE TRENDS

There is some indication that salaries, at least at the manager level, are starting to improve beyond a basic clerical level. This is due to the recognition of the importance of such associations to the marketing efforts of regions and industries. Competition for the tourism dollar is gaining momentum and stature in both public and private organizations as statistics reveal the increased

revenues that can be made through a general increase of tourists to a particular region.

PAY EQUITY

The majority of associations are so small that current Pay Equity legislation will not touch them. Larger associations, like the Metropolitan Toronto Convention and Visitors Association (a unique example of an OTAP, provincial agency and municipal association) have already started to look at Pay Equity and will receive help in job evaluations and wage adjustments from Metropolitan Toronto.

Many of the industry associations are the meeting ground for entrepreneurs and business owners who wish less government intervention into business and are active in lobbying against new legislation that might limit their independence in management decisions. The people rely on the laws of supply and demand and, until the supply of low-wage female labour dries up or goes to a similar, well-paid government association, there is not much hope that the wages will increase.

3. CONVENTION, VISITOR AND TOUR ORGANIZATIONS (private)

This is not a large sector of tourism but one that deserves comment as it is a growing industry and one that appears to be very predominantly female-staffed, owned and operated. The president of Meeting Planners international explained that the convention business had grown out of a basis of convention and meeting planning within larger corporations. The people who usually had this function were the secretarial and administrative staff (primarily women) and as the scope of the job grew, several left the corporations and set up as independent planning consultants. Thus they performed the same function as they had done in-house, but could now specialize in the area and offer the service to more companies.

GENDER PREDOMINANCE AND SALARIES

Of the ones interviewed in Toronto for this study, all had completely female staff, although there are apparently two companies owned by men and several individual male consultants working in the industry.

The companies interviewed usually employed half their staff as full-time and the other half as part-time or casual labour. One agency had 100 people they could call upon to staff conventions as

needed. The going rate for part-time work in this field is from $8. to $10. and up to $12.50 for guides who are expected to know more specific information.

The wages for full-time staff varied with the size and success of the company. A large, successful company reported six staff at the $25,000. range, five at the $26,000. to $35,000. range and one above $35,000. In a smaller company, only the president made slightly over $25,000.

FUTURE TRENDS and PAY EQUITY

This is a growing industry especially in the city of Toronto. To maintain the high rate of growth seen in the past few years, Toronto and Ontario will have to compete more successfully for the international convention market. Federal, provincial and municipal funding is increasing in this area to improve the marketing efforts of cities, regions and attractions.

One outcome of a primarily female- owned and operated small business industry, is that the wages for the work done appear to be better than for similar work conducted elsewhere in companies which are managed by men. The large, more successful companies had a full set of job descriptions for its staff and were considering whether or not to put more effort into job evaluations as a basis for pay equity.

ACCOMMODATION AND FOOD INDUSTRY

The Canadian Tourism and Research Institute (CTRI) have estimated a 24% growth (37,314 jobs) in the Accommodation and Food Industry for Ontario from 1987 to 1992. In 1987, 610,00 people were directly employed in the accommodation and food industry in Canada. A study of the Ontario Service sector in **1986, estimated the number of people employed in the hospitality** industry (hotels, motels, lodging houses, camp grounds, food service) was **195,880**. Exact numbers for 1987 could not be found. One problem in researching employment data in this, as well as other tourism sectors, is that there is a great deal of information on the demand side of tourism such as Traveller Accomodation Statistics, Family Expenditures Survey and receipts for food and beverage, but little on the supply side, or who is employed in these industries.

The following sectors of the accommodation and food industry were defined by the four digit SIC80 codes :

Major Group 91 --	**Accommodation Service Industries**
	9111	Hotels and Motor Hotels
	9112	Motels
	9113	Tourist Courts and Cabins
	9114	Guest Houses and Tourist Homes
	9121	Lodging Houses and Residential Clubs
	9131	Camping Grounds and Travel Trailer Parks
	9141	Outfitters (Hunting and Fishing Camps)
	9149	Other Recreation and Vacation Camps
Major Group 92	**Food and Beverage Service Industries**
	9211	Restaurants, licensed
	9212	Restaurants, unlicensed
	9213	Take-Out Food
	9214	Caterers

After a preliminary round of phone calls and review of what data was available, it was decided to concentrate on interviewing and analysis of available statistics on Hotels in the Accomodation sector and a wide range of restaurants in the Food and Beverage sector. Caterers are being explored by another report at this time for the Pay Equity Commission. The food service occupations of hotels were included for discussion under the Restaurants section of this report.

EMPLOYMENT TRENDS

There are some employment trends common to both the accomodation and restaurant industry . Both industries are known for having a high proportion of low paid or unskilled/semi-skilled jobs. Traditionally these jobs have been filled by young people or immigrants." Many of the young people are attracted by minimal requirements for most entry level positions, the relative ease of obtaining employment and the seasonal nature of some of the work".(CTRI Employment Profile of the Accomodation and Food Industry) Demographic analysts now show that the number of people in the 15 to 24 age group has been declining since 1980 and is expected to continue to decline until 1997. There has also been a decline in the number of immigrants in recent years.

Industry watchers are predicting that the result of the shortage of usual avenues for labour, will push the industry to look to more middle aged and retired people. Such a move would certainly impact on the worker training and benefit plans of many organizations. They will have to commit more resources to competitive salaries, training and retraining. There is also a suggestion that they will have to increase their use of technological devices that replace labour.

1. RESTAURANTS

SCOPE OF THE INDUSTRY

The broad category under which Statistics Canada collects information for the food service industry is entitled Restaurants, Caterers and Taverns (SIC70 886). According to the 1986 census data this Ontario industry had a **59.2% female** labour force. The Ontario Ministry of Treasury and Economics produced the Ontario Study of the Service Sector (1986) drawing from a special run of available 1983 data (hereafter referred to as Service Data, 1983). This publication noted that there were **11,022 firms** in the broad SIC 886 category who employed **146,255 employees** (using Full Year Equivalent approximations).

With the introduction of the four digit SIC80 codes, the food service industry could be examined in greater detail. Table 3 outlines the number and percentage of food service industries in Ontario by size of establishment in 1987. A breakdown of these industries by size showed that :

- 60% of these establishments employed less than 9 people,
- 30% employed between 10 and 49 people,
- 4% employed 50 to 99 people, and
- less than 2% had over 100 employees.
- 5% was accounted for by "unknown" for size of establishment.

It is also important to note the high turnover of staff reported in food service. The staff complement of most restaurants will change greatly from year to year, as will the number of establishments because of the high rate of business closures relative to other industries and high mobility of these workers. The Canadian Food and Restaurant Association (CFRA) reported that 80% of restaurants fail in the first year. The relative percentage of establishments and employees in the different size categories appears to remain constant, but this does not indicate that the basis of such data (establishments and employees) is constant.

The major problem the restaurant industry is facing is the shortage of labour. The CFRA 1987 survey reported shortages in Waitstaff, short order cooks, prep cook, grill cooks, dishwashers and sous chefs. The shortages all appear to be at the unskilled, low level or entry positions.

TABLE 3

Number of Food Service Industries by SIC80 and Size, 1987*

Industry	Number of Employees in Establishment						
	0 - 9	10 - 49	50-99	100-499	Over 500	Unknown	TOTAL
Restaurants,licenced	3570	3338	483	139	6	295	7831
	**45%	43%	6%	2%	---	4%	**100%
Restaurants, unlicenced	3760	1298	152	67	9	248	5534
	68%	23%	3%	1%	---	6%	100%
Take Out Food Service	3604	973	43	16	0	295	4931
	73%	20%	1%	---	---	6%	100%
Caterers	863	194	31	24	9	67	1188
	73%	16%	3%	2%	1%	6%	100%
Taverns, Bars and Nightclubs	504	348	23	4	0	46	259
	54%	37%	2%	---	---	18%	100%
TOTAL	12301	6151	732	250	24	951	20409
	60%	30%	4%	1%	---	5%	100%

* Source: Statistics Canada, Business Register, Ontario Cycle 201, mid-year 1988

** Percentages were rounded to the nearest whole number, therefore they may not add to 100%.

GENDER PREDOMINANCE

Table 4 illustrates that when the female / male worker ratio is examined by size of establishment, there is an inverse relationship between gender and staff size -- the smaller the organization the more probable it is that more women will be employed. One explanation for the increase in percentage of men in larger organizations is that the larger the organization the greater the number of middle and upper management positions. As men are more often found in ownership and management positions, larger companies would have more layers of management and more men. Interviews with people in the industry supported this interpretation.

TABLE 4

Gender Ratio of Foodservice Workers by Size of Establishment

SIZE OF ESTABLISHMENT BY NO. OF EMPLOYEES	FEMALE		MALE		TOTAL	
	NO.	%	NO.	%	NO.	%
1 - 4	7165	65	3842	35	11007	100
5 - 19	19482	52	18021	48	37503	100
20 - 49	14226	45	17473	55	31699	100
50 - 100	5666	41	8237	59	13903	100
100 - 499	7224	42	9778	58	17002	100
500+	15629	46	18064	54	33693	100
TOTAL	69392	48	75415	52	144807	100

Comparing Tables 3 and 4, one can see that although there are a greater number of establishments in the small size categories, there are actually a greater number of people overall employed with medium to large size organizations. In this industry, a large organization would be a chain of restaurants with a supporting administrative structure. In the under 20 employee category (size of establishment), there are a total of 48,510 employees (55% female), and in the over 20 category the total number of employees is 96,297 (44% female).

Geographic region also has an impact on the ratio of women and men working in restaurants. Table 93-966 of the 1981 census reports showed that while there may be approximately equal numbers of men and women in food service (SIC70 886) in Toronto, all other regions and cities in Ontario reported a significantly higher number of women than men in this category. This finding is probably consistent with the findings on size of establishment and predominance of female workers. The larger the organization the more men are employed and Toronto has more large facilities than other cities. Toronto also has a higher proportion of "high class" restaurants and it was found that there is a strong trend to hiring male waitstaff in more expensive restaurants. This trend was found by an informal survey and supported by interviews with long time waitstaff who have worked in different parts of the province.

TYPE OF RESTAURANT

The CFRA collects information on many factors of the restaurant business including employment and wage rates. The most recent survey, a joint venture between CFRA and the Conference Board of Canada, delineated six major categories of restaurants but provided no data on number and size of establishment by type.

- Quick Service
- Table Service
- Cafeteria
- Coffee Shop
- Hotel / Motel
- Other

FINANCIAL BASE

The consensus of opinion, from articles, studies and interviews, is that restaurants are a high risk, low profitability business as a whole, but with good management this profile changes to one of high profitability but reasonable risk due to labour shortages and food supply problems. CFRA and owners and managers interviewed believed that too many people start into the restaurant business with the money to start but without enough knowledge about what the business entails.

CFRA estimated that the major costs incurred in operating a food service establishment were 46% labour and 38% food with additional major capital expenditures needed for equipment. The owner of 6 successful food operations (mid- to high-range) estimated the breakdown of major costs to be 30% each of labour, food and beverage.

GENDER DISTRIBUTION AND WAGES BY OCCUPATIONAL CATEGORIES

A full listing of occupational categories outlined by CFRA in their 1987 survey of the industry is provided in Appendix 2, Table I. The CFRA survey provided a great deal of information on average, minimum and maximum salaries by occupation and region, but no information on gender ratios in each occupation. Information on gender ratios was drawn from the 1985 Wage Rates, Salaries and Hours of Labour, Labour Canada and the most pertinent information for this study can be viewed in Appendix 2, Table II. Statistics on gender ratios for salaried staff could not be found.From hourly wage statistics the following occupations, within the restaurant industry, appear to be staffed predominantly by women:

Occupation	Per Cent Female	Average Wage	
		Female	Male
• Attendant, take-out service	66%	$4.43	$4.08
• Cashier	86%	4.68	3.85
• Host, Restaurant / Coffee shop	80%	5.32	6.46
• Salad and Dessert Maker	73%	5.05	5.40
• Waitstaff	75%	3.80	3.78

The lower hourly rates noted above reflect the minimum wage for students and occupations which receive gratuities. Currently the minimum wage for waitstaff is $4.05. The data above and in Table II of Appendix 4 provide the best overview of where women predominate in hourly paid positions in this industry and what comparative wages are. From interviewing managers and employees, the picture one gets is that every establishment is run differently. Aside from most low level and waitstaff being paid almost uniformly the minimum wage, pay rates, benefits and bonuses are at the discretion of the owner or manager, even in public facilities.

The predominantly male occupations and average wages for hourly staff were: (see listing on following page)

Occupation	Per Cent Male	Average Wage	
		Female	Male
• Bartender	63	4.68	5.47
• Busser	74	4.02	4.07
• Chef-Cook,general	82	5.79	5.69
• Pot Washer	73	4.73	4.50
• Sous-Chef (restaurant)	84	6.83	9.10
• Sous-Chef (hotel)	88	11.43	7.55

The information gained from interviews conducted specifically for this study is that the current 1988 average wages for unskilled jobs (excluding waitstaff) is $4.55 per hour (minimum wage) to $5.50 for chains and small fast food operations, and $5.00 to $6.00 per hour for table service operations. One chain reported very broad wage ranges ($4.55 to 9.00 for kitchen utility jobs) for their staff. This seems to reflect the increase in wages associated with time spent on the job. Increased pay for seniority is one method being used to attract and retain good staff. There is not an overall move, however, to address the labour shortage by improving the low entry wages.

Waiting tables is a predominantly female job in small establishments and in less expensive restaurants. It might be assumed that the gratuities earned in these operations would be much less than in the expensive restaurants where waiting is a predominantly male job. However, interviews with men and women in expensive Toronto restaurants said they averaged $20,000. to $25,000. income per year counting wages and tips. Women in mid-scale restaurants in Barrie and Orillia reported almost the same, about $20,000. This is a difficult area to investigate and estimate as it is common practise not to report all one's tips in order to avoid income tax. From this research it appears that to do well in waiting one needs to work in an expensive restaurant or a mid-level table service operation with good traffic. One women reported that she had worked for Holiday Inn in the same city for quite a while but made much less money because there is less traffic through a restaurant or coffee shop in a hotel/motel than there is in an independent restaurant in a good location. In summary, access to waiting jobs in good restaurants is an employment equity issue not a pay equity issue.

In the professional, middle-management and executive level jobs, information was gained from one chain and a holding company for six independent restaurants. As expected several occupational areas have a predominance of men and as the salaries increase so does the proportion of men. The following list gives some idea of male/female ratios and salaries for such occupations in Toronto-based restaurant companies.

Occupation	Percent Female/ Male	Wage Range(000's)
• Chef	0 100	20 - 40
• Sous-Chef	25 75	20 - 26
• Dining Room Manager	30 70	20 - 25
• Management Trainee	34 66	20 - 25
• Area Supervisors	10 90	35 - 45
• General Managers	20 80	28 - 40
• Directors of Operations	0 100	50 - 60
• Executives	20 80	40 - 100

There is obviously money to be made in the restaurant business and at this point it appears that it goes to ones that are well managed, marketed and planned by those with the skills, experience and/or education to command the salaries in the figures noted above. The problem, from a Pay Equity perspective, is that while there are comparators for female jobs in the low levels, they do not reflect the uneven wage scales as the previous two listings have done.

Job descriptions are common in the chains and larger restaurant but there is uneven use of them in the small establishments. Most of the ones there are in the small operations are quite basic.

EMPLOYMENT TRENDS

The CTRI Employment Profile of the Accomodation and Food Industry points to the reduced number of young people and immigrants as one reason for the dwindling supply of workers in this industry. A high proportion of the work is unskilled and pays accordingly. Young people usually fill such entry level jobs because they lack experience. Immigrants take such jobs because many do not require a good command of the English language, they need any job to get "Canadian work experience" so they can get a better job, and the jobs are plentiful.

The CTRI Profile suggests that the industry will have to hire middle aged or retired workers for many positions simply because their usual source of employees will not be sufficient to meet the growth of the industry

BENEFITS, BONUSES

The CFRA survey reported that most respondents believed their pay to be low in comparison with other industries and that something should be done to narrow this gap. Almost half of reporting firms provided bonus incentive schemes and felt they were required for the management, trades and service categories to attract and retain good staff. The high turnover was reported as a major problem for instituting benefit programs. Other methods to retain employees were:

- Flextime,
- Employee input in deciding hours worked,
- Help in child care assistance for firms with more than 100 employees (it is not clear whether this is help in finding care or on-site care).

In regard to the latter point, the CFRA survey found that single parents and working mothers were widely reported to have higher-than-average standards of work performance and outght therefore "to have greater access to child care facilities".

UNIONIZATION

There is very little unionization in the restaurant industry. Noné of the restaurants interviewed were involved and the CFRA and CTRI studies don't mention them at all. From discussions with owners and managers they are quite happy that unions do not tend to be in independent restaurants and chains. The only food service staff that seem to be involved are those connected with unionized hotels.

PAY EQUITY

Under the current legislation many establishments would be excluded from the Pay Equity Legislation because of their small size. In the event of a compaint, there will not be much likelihood of adjustment in the hourly-paid staff as all wages are low and within cents or 1 - 2 dollars of each other. At the management and professional level, there would be enough men working at all levels within a chain or large restaurant operationt to establish comparators. The possible exception would be in the professional areas like Chef or highly specialized jobs. It would be difficult to compare an assistant manager to a Chef because of the specialized skills of a Chef and the general nature of a management job.

2. HOTELS

SCOPE OF THE INDUSTRY

In 1983, the Service Study reports there were 2,599 Hotels and Motels (SIC70 881) in Ontario with 45,103 employees (using Full Year Equivalent statistics). By **1987** there were **2,983 hotels and motels** and, as exact figures on employment were not available, one could use the 1983 statistics to predict (at an average 17.35 employees per establishment) there would also have been **51,755 employees.**

One characteristic of this industry is the high proportion of part-time workers. Ontario Statistics, 1986, estimated that for 1983 there were 29,055 full-time hotel workers and 13,424 part-time workers. These figures indicate that 32% of hotel workers work part-time.

There are many large chains and holding companies which manage multiple establishments and thousands of employees. The 1987 statistics (Appendix 2, Table I) indicate there were 11 hotels with more than 500 employees in Ontario and 113 with between 100 and 499 employees. Yet the bulk of the establishments had either 0-9 employees (36% of all hotels), or 10 - 19 employees (37% of hotels). In comparison to this wide range of size of hotels, 70% of motels had less than 9 employees, and this basically describes the difference between hotels and motels -- the size of establishment.

As was seen in the restaurant industry, the greatest problem faced by hotels is the labour shortage in unskilled and entry level positions.

GENDER PREDOMINANCE

The same pattern of more women in smaller establishments as was seen in restaurants is also prevalent in hotels. Table 5 shows that overall, and in very large organizations, there is a fairly even split of male and female workers, but in the very small operations (less than 5), there is a predominance of women staff. Although the statistics used were dated (1983), interviews for this study supported the general proportions found. A large hotel near the Toronto airport had 374 staff and 58% of those were female. A downtown hotel of 455 employees had a 40 / 60 female to male ratio.

TABLE 5

Gender Ratio of Foodservice Workers by Size of Establishment 1983*

SIZE OF ESTABLISHMENT BY NO. OF EMPLOYEES	FEMALE NO.	FEMALE %	MALE NO.	MALE %	TOTAL NO.	TOTAL %
1 - 4	1522	62	948	38	2470	100
5 - 19	3832	57	2920	43	6752	100
20 - 49	3319	55	2758	45	6077	100
50 - 100	2359	50	2369	50	4728	100
100 - 499	4011	48	4421	52	8432	100
500+	7243	44	9250	56	16493	100
TOTAL	22286	50	22665	50	44951	100

*Source: Business Microdata Integration and Analysis, Statistics Canada, using Full Year Equivalent Statistics, 1983.

GENDER DISTRIBUTION AND WAGES BY OCCUPATIONAL CATEGORY

The equal overall numbers of men and women are not mirrored in the occupational distributions within the industry. In Appendix 4, Table I there is a sample list of hotel occupations and in Table IV some of these occupations (where data could be found) are presented with gender ratios and average wage rates.(1985 Wage and Salary Rates) The following occupations are most often filled by women :

1985 Wage and Salary Rates for Selected Occupations.

		% female	Hourly Wages Female	Hourly Wages Male
•	Room Cleaner / Maid	99	5.77	5.40
•	Executive Housekeeper	100	8.15	
•	Laundry Attendant(heavy)	89	5.20	6.38
•	Laundry Attendant(light)	85	6.15	6.00

Some of the occupations which are predominantly male are:

		% Male	Hourly Wages	
			Female	Male
•	Houseman/woman	77	5.41	6.17
•	Electrical Repair	100		8.96
•	Carpenter/Maintenance	100		9.41

From the data collected for the present study, it is interesting that the most frequent female job in one hotel was a maid which paid $6.92 an hour, and the most frequent male job was driver at $7.09 per hour, or maintenance at $8.46 an hour. This hotel was part of a chain that was not seen as being very advanced in their management or human resource policies. Another hotel which was part of a chain with a very good reputation in these areas, paid maids $7.37 per hour, parking valets $6.88 an hour and maintenance $8.90 an hour.

A simplified version of occupation segregation was offered by a union representative:

Housekeeping	- almost all female
Maintenance	- 75% male; 25% female
Kitchen	- 25% male; 75% female
Front Desk	- Male dominated
Accounting	- Male
Bartenders	- Primarily male
Servers/Waitstaff	- Fine restaurants almost all male; Originally for historic reasons, now women feel intimidated. Coffee shops almost all female.

FINANCIAL BASE

Hotels operate with generally much bigger budgets and bigger profit margins than do restaurants. One hotel estimated a gross operating profit of 25%. Labour was stated by all those interviewed as a major cost, with estimates varying from 22 to 37%. The hotel, whose labour costs were 37% of the budget, provided a further breakdown as follows:

- 4% for management salary and wages,
- 24% for non-management salary and wages,
- 9% for benefits
- 13% food and beverage costs
- 10% operating equipment, supplies, laundry, etc.

- 4% agency fees, advertising, direct sales, direct mail, etc.
- 3% each for maintenance and utilities.

Hotel closures are not as frequent (no hard data) as restaurant closures both because of the size of the operation and the preponderance of chains. A hotel is a large financial holding against which large mortgages or loans can be be secured and thus time bought to improve the marketing and client turnover for the business. When a hotel is part of a chain, it firstly benefits from the skilled management that the chain can afford, and secondly, can be supported by the chain if it experiences occasional lapses in profitability.

The most prevalent reasons for company closings was felt, by one experienced hotel staff, to be:

- Lack of trained management staff,
- Poor controllers who take general managers down with them,
- People promoted too quickly because of shortages,
- Food and Beverage skills emphasized when really managers need human, resource and accounting skills.

UNIONIZATION

From interviews it appeared that most large and chain hotels had unions active in the majority of non-management and administrative staff.

The effect of unionization on wages in hotels is to ensure at least a small advantage over minimum wage. The Hotel Employees' Restaurant Employees' Union, Local 75 is active in two of the chains that were interviewed and their contract guarantees at least 15 cents above minimum wage to start. The agreements include all full-time workers (over 24 hours per week) and emphasize seniority and internal job postings to help protect and advance their members.

The unions associated with the hotels that were interviewed were:

- The Hotel Employee's Restaurant Employees' Union, Local 75
- The Teamsters
- Hotel, Club, Restaurants, Tavern Employees Union
- Textile Processors, Service Trades, Health Care Professional Technical Employees International, Local 351.

Employees International, Local 351.

One union spokesperson was the only one encountered who felt there was not a labour shortage but rather that this was a myth promoted by management in order to get workers to work harder (eg. waiters to take on bussing duties). His sources had reported that hotel personnel received plenty of applications. He also was firmly in favour of pay equity and stated that it needed to be "taken off the paper and into action".

BENEFITS

Due to the unionization of a majority of hotel workers, several benefits not normally available to restaurant and small hotel workers are available to unionized workers like union pension plans, some payment of O.H.I.P. and, in some cases, payment of group insurance plans.

Hourly paid staff get small bonuses like free meals, while management staff are somtimes offered bonus incentive plans. Two large hotels reported that they already had an Employee Assistance Program in place and were considering adding more medical and dental benefits to their employee package.

FUTURE TRENDS

Labour - how to get and keep it seemed to be the major theme. One person interviewed felt the industry was growing too quickly and most establishments had no human resource systems in place to handle the large numbers of employees. Some hotels are actively recruiting in Europe and the United States, but fear that free trade will mean an exit of staff to the U.S. To keep good staff, there is more emphasis on developing career planning programs and succession planning plus more money put into benefits and compensation. These are the 'good' companies to work for. There are still many out there operating on the old methods of a small management team, low wages and high turnover.

There has been a great growth in training programs for the hospitality industry over the last 10 - 15 years, courses like the University of Guelph's Hotel and Food degree, George Brown Community College's world-class chef training, and many other college and university level programs. These have brought a professionalism to the hotel industry that was not there 20 years ago. But there is still the industry culture that says one must work their way up from chambermaid and waitress for women and bellhop and waiter for men, whatever one's educational background.

CULTURAL INDUSTRIES

An important part of the tourist industry is the variety of cultural activities which both tourists and local populations attend in their leisure time. Museums, art galleries, live and motion theatres, dance and musical performances are noted as key attractions in the tourist literature for most geographical locations. However, to gain quantitative and qualitative information on the employment and funding patterns in these activities proved confusing and difficult.

In statistical descriptions, funding organizations and umbrella associations, it is common to group several cultural activities together. For example, librairies, museums, art galleries and archival organizations are all SIC70 807 and the change to the four digit SIC80 simply separated librairies from this group. The Canadian Museum Association includes all types of collections including science and visual arts, and theatre associations may or may not include community and professional theatres, opera theatres and musical theatres. The Ministry of Culture and Communication funds many activities directly and/or through an agency like the Ontario Arts Council.

To present the information in the clearest possible form, this section will describe first the widest scope of the arts found, that described by **Canada Council**. Then, as most activities are primarily funded by government, the various **funding organizations** and their scope and methods will be outlined. From this overview, the description will move to characteristics of primary sectors which have been found to be all, or in many establishments, predominantly staffed by women. There was not sufficient evidence or time to support a qualitiative review of smaller specialized areas of the arts like dance or musical performances. This section of the report is divided as follows:

1. **The Arts as Described by Canada Council**
2. **Funding of the Arts**
3. **Museums,**
4. **Art Galleries,**
5. **Theatres, Performing Arts,**

As several **associations or unions** are active in more than one of these cultural sectors, these groups will be described under the first sector with which they are associated, and thereafter they will be referred to where appropriate but not further discussed.

1. THE ARTS AS DEFINED BY CANADA COUNCIL

According to Canada Council's Director of Research and Evaluation, the Arts industry in 1981 was estimated to be the largest employer of Canadians, surpassing even the largest manufacturing sector employer. He further predicted that the employment possibilities in the Arts would be enormous in the future as government and industry recognized the importance of this sector to international industrial competition.

The basis for the above estimates of present and future employment are statistics on what Canada Council considers to be an 'Arts' industry. They are:

- Advertising
- Manufacturers of Radio and TV
- Performing Arts
- Book and Stationary Stores
- Sound Recording Industry
- Visual Arts
- Radio and Television Industry
- Motion Picture Theatres and Production
- Publishing and Printing
- Public Librairies
- Record and Tape Stores
- Libraries, Museums and Archives

A more detailed outline with corresponding SIC70 and SIC80 codes is provided in Appendix 3. Clearly some of these industries would be included in tourism associations or definitions and others would be considered more manufacturing or retail sector industries.

The researchers at Canada Council attempt to collect as much information as possible on both the demand and supply sides of these industries. This is a problematic task as Statistics Canada does not collect and/or provide the data they need and it is difficult to justify using funds on data research rather than direct support of the Arts. What information they do have is available free to Arts organizations and for a fee to government and private companies.

The Council distinguishes between the Arts Labour Force, who are employed using arts-related skills, and the Arts Industry Labour Force, who may or may not be using arts-related skills. An important employment fact is that 75% of artists are employed full-time outside of the arts industry. This reinforced what was found in interviews with theatres and art galleries, that it is difficult to earn a decent living because of low salaries and unpredictable funding.

The Canada Council supports 250 arts organizations across Canada, of which more than half are in Ontario, and more than 75% of the Ontario organizations are in Toronto. They do have more information on organizations' personnel and finances but the data is filed by requesting establishment and not aggregated to provide estimates of sex ratios or salary ranges.

2. FUNDING OF THE ARTS

Financial support is availabe to the arts from all three levels of government. It is clear that without this support most non-profit arts establishments could not exist. Funding is provided for either operating expenses (administration, salaries,etc.) or programming (specific, one-time events or projects). The larger and more established institutions or sites can usually count on the provincial or municipal governments for a proportion of annual assistance in their operating expenses but must prepare detailed budgets and business plans to maintain this support.

Lack of funding, or difficulty in accessing what is available, was suggested to be the primary reason for arts-based establishments for closing, according to the Association of Cultural Executives. They reported, however, that there "not a lot" of company closings but that they felt it was more due to the talented and committed management of these sites than to any regularity in government funding. Museums, art galleries and theatres must apply to government for funding on an annual, or program, basis. This makes yearly planning for staff very tentative, and makes employment in these areas low-paid and unstable.

EXAMPLE: The Canadian Opera Company

A profile of the funding of one establishment gives a good overview of the complexities and difficulties of financially operating an arts company. The Canadian Opera Company (COC) is very similar in size and financial operating to the National Ballet, the Shaw and Stratford Festivals. The COC employs a full-time staff person to relate to government to gain their financial support.

Sixteen per cent of the operating expenses come from Canada Council and slightly less than this amount is from the Ontario Arts Council, an agency of the Ontario Ministry of Citizenship and Culture. This funding requires an annual application supported by a great deal of paperwork. One current difficulty is that the Canada Council operating grant budget has been frozen until 1991 which will have a serious impact on hiring and wages in the institutions it supports.

A large proportion of arts' funding is based on grants for specific administrative or artistic projects (interns, videos, festivals, touring, special operas). For these funds, one must know whether it more likely that Canada Council, the Ontario Arts Council, or the Ministry of Citizenship and Culture will fund such a project. For example, $75,000. was granted to produce three new operas and approximately $125,000. was given to support the half-million dollar touring budget. Specific government support for employement is seen in programs like Experience '88, a provincial program to support the hiring of students.

The balance of the COC budget must be derived from memberships, fundraising activities and admissions. While this does not give a detailed account of the total budget, it gives a good insight into the complexity of operating an arts attraction establishment with 89 (21.2%) full-time staff (equal gender ratio), and 331 (78.8%) part-time or contract staff.

Statistics Canada surveyed 354 Ontario museums to assess their sources of income with the following results:

SOURCE		INCOME IN MILLIONS OF DOLLARS
Government:	Federal	49
	Provincial	31
	Local	10.5
	Other	1.2
Other		19.8

It is clear that without government support most arts organizations would not survive and that public funding can have a great impact on wages and employment opportunities. One government source said that, while there are quidelines for granting, quite often there are wide and very flexible descretionary powers attached to the process. This means the process becomes ambiguous and political, and it is unclear to both those requesting grants and to observers how and why the funding takes place.

3. MUSEUMS (including some Art Galleries and Archives)

"Museums have been shown to be more potent tourist attractions than the performing arts." Ekos Research Associates, Culture, Multiculturism and Tourism, Pilot Projects and Related Studies - A Synthesis, 1988, 23.

SCOPE OF THE INDUSTRY

According to the 1987 Business Register data on Ontario organizations by number of employees (Appendix 3), there are 202 Museums and Archives establishments in Ontario, of which 73.8% employ less than 10 employees. This leaves 26.2% that would fall under the guidelines of the Pay Equity Legislation according to size of establishment. Another source of information, the Canadian Museums Association(CMA), had 580 listings for museums, galleries and archives in Ontario in their 1987 / 88 directory. It is difficult to explain this wide descrepency in estimates but it does have a broad and varied membership which would capture many galleries,

associations and interest groups that may not be classified as museum or archival institutions.

GENDER PREDOMINANCE

Studies or surveys of the industry as a whole suggest that there are equal numbers of women and men employed in this area. Interviews with people in the industry and a closer examination of the available statistics indicate that there is a predominance of women working in all but the largest museums and galleries. Small sites typically have from one to five full-time staff and many operate only for three to six months of the year. Often there are several part-time staff (usually female), contract staff or students (seasonal, part-time or co-operative programs) plus volunteers.

The Ontario Museum Association was illustrative, in staffing, of the member organizations it represents (and of other industry and interest associations). It has a full-time male executive director and female educational coordinator, a female part-time executive assistant and three contract staff paid through federal employment grants. It was usual to find the one male staff (other than perhaps a part-time custodial employee)in a small museum as the senior employee whose salary was therefore higher than the rest of the staff. Salary levels and differences by gender is addressed in a later section.

Table 1 (next page) is drawn from the soon to be published national survey, Labour Market Study in the Museum Sector (Communications Canada). It describes the proportion of female and male staff in a sampling of Canadian museums by the size of the organization. While it draws from the whole country, 40% of the respondents were from Ontario making the information a reasonable approximation of what a survey of solely Ontario museums might show. It illustrates quite clearly that the smaller the institution the larger the proportion of female employees to male employees.

TABLE 1

LABOUR MARKET STUDY IN THE MUSEUM SECTOR

Proportion of female / male staff by Size of Institution, Canada, 1988

Institution Size	Female		Male	
	Number	Percent	Number	Percent
1 - 2 employees	21	74.1	7	25.9
3 - 5 employees	19	67.6	9	32.4
6 - 20 employees	45	54.5	38	45.5
Over 20 employees	141	44.8	178	55.2
TOTAL	226	49.7	229	50.3

MUSEUM TYPE

The Canadian Museum Association categorizes establishments under the following headings:

- Museums or Galleries of Contemporary, Fine or Decorative Art
- Community Museums
- Forts & Military Museums
- Maritime & Marine Museums
- Museums of Human History, Archeology, Anthropology or Ethnology
- Museums or Centres of Science & Technology
- Museums of Religion
- Natural History or Natural Science Museums
- Sports Museums or Halls of Fame
- Transportation Museums
- Multidisciplinary Museums
- Historic Sites, Buildings, Parks and Commissions
- Exhibitions or Art Centres
- Other Museums (eg. B.C. Sugar Museum or other unable to classify)

PRIMARY GOVERNING AUTHORITY AND FUNDING BASE

1. Provincial Organizations

A few of the larger establishments are run as agencies of the provincial government and their staffing and human resource policies must be in line with those of public servants. The following establishments are agencies of the Ministry of Citizenship and Culture:

- Ontario Science Centre,
- Art Gallery of Ontario,
- Ontario Arts Council,
- Ontario Heritage Foundation,
- Royal Botanical Gardens,
- Royal Ontario Museum (including the Gardiner Museum),
- Science North,
- The McMichael Canadian Art Collection.

There are other sites under other ministries, for example the Ontario Agricultural Museum is under the Ministry of Agriculture and Food, and the Ministry of Natural Resources administers Spruce Lake Farm. Several of these sites can be alternately described as museums, attractions or

conservation authorities.

Beyond the direct transfer of payment funding which the above-noted sites receive, over 200 museums receive annual operating grants or start-up and special program grants from the province. One source indicated that the annual operating grants are available in amounts up to 50% of the museums's annual budget and are granted in proportion to either new acquisitions/capital costs and/or to matching the funding raised by other sources. The organizations listed in the following categories would all receive such funding.

2. Municipally Operated Organizations

Museums or art galleries administered by city, town or county governments will have staffing policies in line with municipal employees and may be governed by a board of directors or as a department of the municipality.

3. Conservation Authorities

Several parks and recreation sites include museums or galleries (eg. Black Creek Pioneer Village, the Algonquin Park Museum). Governing of staff on these sites is therefore associated with the provincial ministry or local municipality that oversees the park operations.

4. Indian Bands.

There are two museums owned and operated by Indian Bands in Ontario.

5. Non-profit, Private Organizations.

Many small, non-profit museums and galleries are able to remain viable financial operation through the funding they receive from all levels of government, private donations, admission receipts and retail sales. They are generally governed by a board of directors.

GENDER DISTRIBUTION IN OCCUPATION AND INCOME

Statistics Canada estimates that there is an average of 3.9 full-time workers in each of the institutions in the museum sector. Large institutions like the Royal Ontario Museum inflate this number as they have a staff of 450 full-time and 43 part-time, it is more usual for small museums to have only one or two full-time staff (Director/Curator and technician, registrar/archivist or clerical/reception staff), a few part-time clerical or interpretor/guide staff and volunteers. Unfortunately, although Statistics Canada compiles the largest data source on museums, art galleries, archives, aquariums, zoos, planetariums, historical restorations and parks through its

Survey of Heritage Institutions, the survey does not collect data on gender or occupational title of employees.

The Labour Market Study by Communications Canada surveyed the following professional and technical staff:

Archaelogists	Archivists
Business Managers	Conservators
Curators	Data Processors
Designers	Directors
Educators	Extension Officers
Fund Raisers	Interpretors
Librarians	Public Relations Officers
Registrars	Researchers / Writers
Technicians	Curatorial Assistants

This study found that male museum employees earn on average an annual income of $34,320. whereas women earn only $28,750. If administrative, clerical and custodial occupations had been included in this study the discrepancy may have been much larger as Ontario museums surveyed for the present study reported clerical wages of $15,000. to $18,000. and part-time workers paid minimum wage and up to $6.50 per hour. The only male comparator available was usually in maintenance and the wage was similar to the clerical workers.

The national study for Communications Canada ascribed the gender difference in wage averages to occupational segregation at the upper levels. Men held the majority of highest paying positions like curator, director, archaeologist, and business manager. Another predictor of wage levels and lower wages for women was related to the size of the insitution. **Smaller institutions had a higher proportion of female staff and a lower overall wage structure.**

Larger institutions, unionized ones and government operated museums generally had much higher wage schedules than non-profit institutions. For example the national average salary for a curator was $37,300., but at the Royal Ontario Museum where a curator must have a Ph.D. salaries start at $48,000. The gender ratio for curators is similar nationally and for Ontario, at 35% female and 65% male.

Ontario offers higher salaries on average than the rest of the country and more opportunity because of the proportionately higher number of museums in general and the greater number of

large ones where some advancement is possible. Yet, one Curator / Manager reported that he had worked for a museum for eight years and then quit because of the low salary ($27,000.). After two years of high turnover in this position because of low wages, the board of directors decided to hire him back at $37,000. Another male curator, the only full-time employee of a small non-profit museum, reported making $26,000.

The salary problem was addressed "by every respondent" in the national Labour Market Study. The sentiment expressed was that nobody was in it for the money, especially in the smaller institutions where it was very hard to make a decent living.Rather they were in it out of real interest in the field. It was found that incomes earned by museum workers are no higher than incomes earned in other fields of the arts and culture sector. In that study, multiple regression analysis was performed to identify those factors that had the greatest impact on income in museum work with the following results:

- Negative relation to income
  - Gender (female)
  - Primary Governing Authority (non-profit)
  - Region of Canada (Maritimes)
  - Institution size (smaller)
- Positive relation to income
  - Age
  - Time in Profession (seniority)
  - General Education
  - Museum Size (larger)
  - Occupation

UNIONIZATION

There is very little unionization on the whole across the province. Unions like OPSEU are involved in government administered agencies, and ROMCA is a professional union tied directly to the Royal Ontario Museum. One Curator felt that the low infiltration of unions was due both to the small and diverse nature of museums and galleries, but also to the conservative attitude of those who worked in these institutions. Another interviewee who was active in the national Labour Market Study said there is a tremendous resistence to unions by directors and boards of directors in small museums. They feel the primary goal of their staff is to be dedicated and serve the public, and that unionization would make them put their own needs ahead of the those of the public who visited the sites.

FUTURE TRENDS

The proportion of female to male museum employees will rise in the future as more women than men train to enter the field (100% of this year's entrants into the M.A. in Museology at the University of Toronto are female) and the move from volunteer to paid staff continues. Most volunteers are women who were financially able to volunteer and then are viewed as not "needing" a large salary when they start, or to whom the money for working is not important. (Views of three men interviewed).

The greatest barrier to the advancement of the substantial numbers of women who are entering this industry will be the 'clogging' of the system at the top by older professional men, especially in large institutions. In smaller institutions advancement is always limited, and will only improve with greater funding for a larger number of paid positions. One small museum did note that their budget had increased from $54,000. in 1985 to $177,000. in 1988 so there must be some forces, either governmental or societal, that are supporting or encouraging growth in the smaller community and non-profit museums, galleries and local attractions.

PAY EQUITY

Pay Equity is not seen as being a problem in the large federal and provincial institutions as they will be drawn in under their civil servant job evaluation and wage schedules and their connection with unions. Similarily municipally operated institutions will have comparators within the same establishment with the slight problem of having to find a comparator within their local government to some very unique jobs.

In the smaller institutions, regional disparities in wages and high unemployment will keep the wages low and as most are under ten employees, they will not have to comply with the legislation. The only method to remedy the low wages is to increase the granting or fundraising of these organizations. While contract compliance tied to grants might work for some areas, it is the general consensus that non-profit boards of directors would say the paperwork and increases weren't worth the effort and they would find alternate means of funding or reduce the paid staff, replacing them with volunteers.

2. ART GALLERIES

Much of what needs to be said about the organization and funding of art galleries has been covered in the previous section on museums. This section will just highlight additional information that is peculiar to art galleries.

SCOPE OF THE INDUSTRY

The Ontario Association of Art Galleries (OAG) reported that there are 27 public galleries in Ontario which employ 137 people in total and have staff complements from 3 to 35 people. The McMichael Canadian Art Collection, which is an agency of the Ministry of Citizenship and Culture, has 150 staff total, of which approximately 28 are full-time employees.

GENDER PREDOMINANCE AND OCCUPATIONAL CATEGORIES

OAG was unable to provide exact statistics but offered the opinion that most art galleries were female, and were active in all occupational categories. The following 'typical' occupational categories were provided for large and small galleries.

Large Gallery:	Director	Small Gallery:	Curator/Director
	Curator		Admin. Assistant
	Admin. Assistant		Curator
	Conservator		Custodian
	Membership Director		Secretary
	Gallery Attendants		
	Custodial staff		
	Secretaries.		

FINANCIAL BASIS AND SALARIES

Funding for operating and core grants come from a variety of sources like the Ministry of Citizenship and Culture, the Ontario Arts, Canada Council and the Toronto Arts Council. Many of the galleries have had to use government funded job training programs to get staff but this results in a lot of temporary staff.

It was estimated that gallery directors could make anywhere from $16,000. to $30,000. per

year depending on the size and funding of the operation. Part-time attendants usually make around $8.00 per hour and the rest of the staff falls somewhere in between these top and bottom salary ranges.

FUTURE TRENDS AND PAY EQUITY

From talking to a few gallery directors and attendants, it appears that not much changes over the years or is expected to do so. There are a lot of older people (approximately 40 to 65) involved in the galleries who have been there "forever" and in spite of low salaries and undependable funding continue their association because of their intrinsic interest in the field. There is some concern that there are not enough younger "committed" people coming along to fill the shoes of the senior staff both because of the lower numbers of young people available for employment and the low salaries.

Small establishment size and the lack of male comparators will be a deterrent to the introduction of Pay Equity in most public and private, retail art galleries.

3. THEATRES

On the strength of reports that theatre production companies, or at least the administrative core of them, might be predominantly female, interviews were conducted with a small and large theatres, the Director's Guild, a freelance stage manager, PACT (Professional Association of Canadian Theatres) and letters were sent (without response) to gain the input of the most powerful theatre union, IATSE. This field of inquiry was finally abandoned because it was found that, while there may be slightly more women than men in theatre administration (and this is not true for all theatres), and there is occupational segregation , overall there are fairly even ratios of women and men.

Some notes of interest from this research may be useful in the consideration of Pay Equity in relationship to the theatre industry:

- People who work in the theatre are a very mobile group, especially the actors and others associated with production rather than administration. They are only with the theatre for the run of the production and many work as self-employed individuals.

- The IATSE union is very strong and covers occupations like stagehands, wardrobe, and the trades associated with theatre. It is also considered quite a closed union with membership being passed from father to son, or needing to know someone to get in.

- As in most service organizations, most of the middle management and support occupations are filled by women as either paid or volunteer staff (fundraising, marketing,etc.)

- At the higher levels of general management and production director, most incumbents are men. Most of those in the Director's Guild of Canada are men.

- Community theatres need to be considered separately from professional theatres as most of the former theatres are operated by volunteers with the exception of a paid director. In professional theatres, there "is some commitment to earning a living", even if the reality is that few can really do this.

- There are great differences in budgets, job descriptions and salary ranges depending on the size of the theatre and where it is located. It is difficult to find a standard model.

- A sample of the occupations one might find in the theatre are:

Artistic Director	Production Manager
General Manager	Technical Director
Administrator	Stage Manager
Comptroller/Accountant	Carpenters
Fundraising Director	Electricians
Publicity & Marketing Director	Wardrobe
Secretary	Properties and Production Crew
	Director and Assistant
	Choreographer

Sources for researching further information in this field are listed in Appendix 3.

ATTRACTIONS

DEFINING ATTRACTIONS

Attractions Ontario lists 80 members in their membership directory, 13 of which are government agencies or centres which are considered public institutions. While most attractions have foodservice operations or theatrical entertainment attached to them, at least ten of those listed by Attractions Ontario could be considered more directly accommodations, restaurants or theatres. Several of the attractions are museums and galleries. What is seen is that "attractions" covers a very broad variety of establishments, many of which have been considered under other sections of this study.

Another approach to studying attractions, is to consider them under Statistics Canada's SIC70 code of Miscellaneous amusement and recreation services (849). This again is a broad category that encompasses organizations that are not considered a direct part of tourism such as video arcades, pool halls and party services. The 1986 census found that this category had a 48% rate of female employment.

The approach adopted for this study was to consider the SIC80 category of Amusement Parks, Carnivals and Circus Operations (9692) and to conduct random interviews with notable, large attractions both public and private.

SCOPE OF THE INDUSTRY

A review of the number of establishments in SIC80 9692 by size (see Appendix 1, Table III) shows that approximately 63% of amusement parks employ less than 9 people and only 2% employ more than 500 people. In Ontario there has been a great growth in "theme" parks in recent years with waterslides and other expensive capital-cost startup operations being built in smaller centres than was previously seen. A few years ago most large attractions were within commuting distance to Toronto (Canada's Wonderland, Marineland, African Lion Safari) but there are now such establishments outside of Ottawa, in Collingwood and far north of 'the Golden Horshoe'.

There is a very high proportion of seasonal and part-time labour in this industry. This study could not locate specific data on actual numbers or percentages of full-time or part-time/seasonal labour in this field because the statistics that are collected to not lend themselves to this type of analysis. A sample of the information collected through interview gives some idea of the range of

number of employees in this industry.

ORGANIZATION	FULL-TIME	PART-TIME/SEASONAL
Marineland	120 - 130	320 - 330
Cullen Gardens	67	176
African Lion Safari	25	125
CNE	200 (approx.)	1,500 students 150 (approx.part-time)
Beasley Amusements	10	500

GENDER PREDOMINANCE AND OCCUPATIONAL CATEGORIES

There is no evidence to suggest that there is a predominance of female employees in this industry, rather there is more occupational segregation, as in other industries. More outdoor work is performed by men, more retail, housekeeping and clerical work is done by women. Those establishments that have more of a retail or accommodation focus reported a predominantly female workforce because their sales force and housekeeping staffs are all female. Owners and senior management staff are almost always male.

The lists of occupational categories are as different as the attractions themselves. Ski resorts will have more mechanics and operations staff, while a small theme park may have none. One company which has several sites reported that at each site there was a manager (all male), an assistant manager, sales staff (all female), and maintenance people. The head office of this operation encompassed the following occupational categories:

- President (male),
- Vice-President Operations (male),
- Archivist (male),
- Assistant to Archivist (vacancy),
- Vice-President Finance (male),
- Controller (female),
- 2 Accountants (male and female),
- 2 Secretaries (female),
- Business Development (male).

FINANCIAL BASE

Within this industry there is a mix of non-profit government affiliated and private, for profit establishments. As would be expected the former ones are heavily subsidized. Detailed interviews on major costs and profitability were not conducted because there was not enough evidence to suggest a predominance of female staff to support this time expenditure and private companies were less than forthcoming when finances were mentioned in the preliminary interviews.

WAGES, SALARIES AND RECRUITMENT / TURNOVER

Due to the high proportion of part-time and seasonal staff, organizations were questioned regarding their hourly rates and ability to recruit and keep this staff. The range for seasonal and part-time unskilled help was approximately $4.50 to $6.50 per hour, with tour guides receiving more often in the $8. to $10. range. Many facilities reported a difficulty in recruiting staff at the minimum wage level and several had, in the last year, increased their starting wage to $6.50 an hour. Two managers reported that this had seriously reduced the amount of turnover in staff, and increased the number of "good" applicants.

For those who volunteered information on the wages of salaried employees, the clerical and support salaries were comparable to similar jobs in other industries and a manager of a small facility might make in the $30,000. range per annum.

UNIONIZATION

Only one of the private facilities reported any union involvement and that was for labourers (which union is unknown). The attractions associated with the provincial government have a high proportion of OPSEU coverage and the Metro Zoo, which is affiliated with Metro Toronto Council has 180 CUPE members.

PAY EQUITY

Those attraction affiliated with government reported already actively reviewing their job evaluations in prepartion for Pay Equity. None of the private operations mentioned job descriptions or evaluations voluntarily, but on questioning it appeared that the larger operations did have some rudimentary form of job descriptions for at least the operations and middle-management staff, but not for part-time, low level or seasonal staff.

RESEARCH PLAN

The basic approach taken in this study was to, first, try to access quantitative data to assess which industries were worthy of more indepth study because of female predominance, and second, to obtain qualitative data on such industries through a review of pertinent studies and surveys, and through personal and telephone interviews with key people in the field. The actual step-by-step process that was followed is outlined in this section with comments on particular key sources of information and difficulties encountered in conducting the study according to the overall plan and in light of the terms of the contract.

1. GAINING AN OVERVIEW

To obtain an overview of the tourism industry --- what industries are included, past and future trends, economic importance --- several key people at both the provincial and federal government levels of tourism research were contacted. The most useful centres of information were found to be:

Research Office, Ministry of Tourism and Recreation,
Tourism, Statistics Canada,
Canadian Tourism Research Institute.

2. ACCESSING QUANTITATIVE DATA

Industries and occupations which were thought to be of interest were identified by their SIC70, SIC80 and SOC codes, respectively, to facilitate research into the demographics of the selected industries. The purpose of this exercise was to gather information on industries by the gender ratio of their employees, the number and size of establishments and their regional distribution. This proved impossible to gather for the following reasons:

- The SIC 70 codes (three digits) are gross measures amalgamating several diverse industries and especially problematic for this study because many of the specific industries had no code of their own (eg. Travel Agents).

- A special request for 1986 census data was filled for industry by gender ratio, but as it compared 1971, 1981 and 1986, the three digit SIC70 codes were used (Statistics Canada made this decision for reasons of comparing data).

- The information of industries by size of establishments was available broken down to the more exact SIC80 four digit codes but no gender ratio information was available at this level.

- Regional information was only available from the 1981 census data which used the major industry groupings, or occasionally the minor industry groupings (SIC70, three digits). This approach could capture large industries such as restaurants and accommodations but as museums were grouped with librairies, and travel agents in with miscellaneous transport industries, regional comparisons could not be made. Even with regional information on restaurants and accommodations, the information was not available by size of establishment and so informed comparative statements could not be made.

3. SELECTION OF INDUSTRIES FOR FURTHER INVESTIGATION

Appendix 1, Tables I, II, and III provides the full range of industries considered for inclusion in this study. From these lists certain industries were not explored for the following reasons:

- Air, rail and boat transport are federally, not provincially, regulated industries.
- Occupations that were easily observed to be predominantly staffed by men were not considered pertinent to the study (eg. race tracks, golf courses, athletic clubs, taxis),
- Private art galleries were considered to be part of the retail industry and thus covered by another research study, as were caterers.

The remaining industries were considered according to information that could be found on their employment gender ratios and size of most establishments. From this perspective the following industries warranted a preliminary investigation, after which the starred ones (*) were considered appropriate of a more indepth investigation.

Attractions *	Restaurants *
Hotels,* and Motels	Campgrounds, Travel Trailer Parks
Motion Picture Theatres	Theatres *
Tourist Associations*	Ski Resorts
Museums, Art Galleries*	Travel Agencies*
Parks	Tourist and Convention Planners*

4. NATIONAL SURVEYS OF KEY INDUSTRIES

It was found that Statistics Canada conducts surveys, on an irregular basis, in a number of areas pertinent to this study:

Annual Survey of Amusement and Recreational Services,
Performing Arts Survey,
Survey of Heritage Institutions.

Although this would appear to be a rich potential source of information, it proved to be a dead-end as no information is collected on occupational titles, occupational wages or gender of employees. Further, the information is not collected along SIC or SOC code lines. Blank copies of these forms are addended to this study as a point of interest and possible future investigation.

5. QUALITATIVE RESEARCH

The primary investigator and three researchers divided the industries which warranted further investigation among them for followup by interviews. It is important to note that these researchers were not starting from uninformed perspectives as:

- The travel industry was explored by a person with job experience in a travel company, with an air carrier, and as a counsellor in the college with the most travel-related courses.
- The accommodation and restaurant industry was investigated by someone who had recently been employed in the human resources department of a large hotel chain. Also the primary investigator who interpreted the information collected had had extensive experience interviewing the restaurant and foodservice industry regarding pay equity in a previous research study.
- Attractions were canvassed by the former public relations director for the Ontario Science Centre who had also been active in Attractions Ontario.

Questionnaires were developed to guide the interviewers but as they questions were so extensive, they were only fully completed for a small proportion of those interviewed. As the research progressed, it was found to be more fruitful to first focus on basic employment demographics (number, gender and occupational titles), and then, depending on the cooperation of the interviewee, request information on wages, recruitment, job descriptions, associations and unions, major costs and profit margin, and future challenges and trends. As a general guideline, full personal interviews were conducted in the travel agency, restaurant and hotel industries while

phone interviews were used for cultural activities and attractions. There were exceptions going both ways in this general methodology. Sample questionnaires are provided in Appendix 4.

6. INTERPRETATION AND REPORT

Only the most pertinent information was extracted from all the information collected, to be included in this report. Where time permitted, a third round of brief telephone calls were made to check on specific facts. The information and report is as complete as the time limits of the study would allow.

It is hoped that a better picture of the regional aspects of these industries is drawn from the larger quantitative survey that is being conducted. This is one area where it was felt more information would be useful. Another area still in question is the extent to which part-time, seasonal and student labour is included in the human resource policies (benefits, job descriptions, etc.) of the seasonal tourist industries. These areas were perceived as more important as the study was finishing and there was not time to go back and research these areas.

APPENDIX 1

OVERVIEW OF TOURISM INDUSTRY

TABLE I	Industries Reviewed in Federal Studies
TABLE II	1986 Gender Distribution Statistics for Selected Industries
TABLE III	Number of Selected Industries by Size of Establishment
TABLE IV	Regional Employment in Major Industries,
TABLE V	1982 Tourist Association Regions, Ontario
TABLE VI	Number of Tourism Industries by Ownership, 1983

TABLE I

SIC70 INDUSTRIES USED IN FEDERAL STUDIES OF TOURISM

The following industries have been selected as representing, all or in part, those establishments connected with tourism by several federal studies of tourism. These codes were used to work with the 1981 census data and, in a federal study soon to be released, as a basis of comparing employment in the 1981 and 1986 census information.

The three digit SIC breakdowns only provide a gross aggregation of information related to each area. Therefore, the researchers at Statistics Canada use formulas (both accurate and intuitive estimates) to estimate the proportion of each area that may be attributable to real tourism expenditures. For example, 512 sums the information on the taxicab industry, but a small proportion of this industry is dependent on tourists, and this proportion would vary greatly depending on the geographic location. Also, 517 polls all industries with MIscellaneous Service Incidental to Transport. This includes, but does not distinguish, travel agencies which predominately employ females.

TRANSPORTATION

501 Air Transport
503 Rail Transport
504 Water Transport
508 Bus Transport, interurban and rural
509 Urban transit systems
512 Taxicab Operations
517 Miscellaneous services incidental to transport

RETAIL

654 Gasoline Service Stations

CULTURAL ACTIVITIES

807 Librairies, museums and other repositories
844 Golf and country clubs
845 Theatrical and other staged entertainment
849 Miscellaneous amusement and recreation services
(I would also include 841 Motion Picture Theatres)

ACCOMODATION AND FOOD SERVICES

881 Hotels and Motels
884 Camping grounds and trailer parks
886 Restaurants, caterers and taverns

MISC.SERVICES

894 Automobile and truck rentals

TABLE 2

ONTARIO TOURISM SIC70 INDUSTRIES BY SEX, 1986 Census Data

INDUSTRIES		FEMALE	MALE	TOTAL
TRANSPORTATION				
508	Bus Transport, interurban and rural	475 25%	1450 75%	1925 100%
509	Urban transit systems	2135 13%	13895 87%	16030 100%
512	Taxicab Operations	1580 14%	9310 86%	10890 100%
517	Miscellaneous services incidental to transport	10670 59%	7265 41%	17935 100%
RETAIL				
654	Gasoline Service Stations	7240 24%	22520 76%	29760 100%
CULTURAL ACTIVITIES				
807	Librairies, museums and other archives	11495 72%	4450 28%	15945 100%
844	Golf and country clubs	3860 40%	5775 60%	9635 100%
845	Theatrical and other staged entertainment	4170 39%	6565 61%	10735 100%
849	Miscellaneous amusement and recreation services	15360 48%	15420 52%	30880 100%
ACCOMODATION AND FOOD SERVICES				
881	Hotels and Motels	37710 61%	24330 39%	62040 100%
884	Camping grounds and trailer parks	2370 48%	2610 52%	4980 100%
886	Restaurants, caterers and taverns	127485 59%	88040 41%	215525 100%
MISC.SERVICES				
894	Automobile and truck rentals	1730 29%	4225 71%	5955 100%

Selected Ontario Tourism Industries By SIC80 and Size

SIC code	Industry	Number of Employees in Establishments						
		0 - 9	10-49	50-99	100-499	over 500	unknown	TOTAL
4574	Charter/Sightseeing Buses	35	14	3	2	0	1	55
		63.64%	25.45%	5.45%	3.64%	0.00%	1.82%	100.00%
4575	Limousines to Airports/Stations	19	11	1	0	0	3	34
		55.88%	32.35%	2.94%	0.00%	0.00%	8.82%	100.00%
4581	Taxicab Industry	1047	179	28	5	0	96	1355
		77.27%	13.21%	2.07%	0.37%	0.00%	7.08%	100.00%
8264	Prov.Rec and Culture Admin.	2	10	5	4	2	3	26
		7.69%	38.46%	19.23%	15.38%	7.69%	11.54%	100.00%
8551	Museums & Archives	149	28	5	7	3	10	202
		73.76%	13.86%	2.48%	3.47%	1.49%	4.95%	100.00%
9111	Hotels	479	494	134	113	11	102	1333
		35.93%	37.06%	10.05%	8.48%	0.83%	7.65%	100.00%
9112	Motels	1156	234	19	5	0	236	1650
		70.06%	14.18%	1.15%	0.30%	0.00%	14.30%	100.00%
9113	Tourist Cabins	1071	69	1	0	0	256	1397
		76.66%	4.94%	0.07%	0.00%	0.00%	18.32%	100.00%
9114	Guesthouses	63	8	0	0	0	14	85
		74.12%	9.41%	0.00%	0.00%	0.00%	16.47%	100.00%
9131	Campgrounds and Travel trailer parks	555	51	1	2	0	50	659
		84.22%	7.74%	0.15%	0.30%	0.00%	7.59%	100.00%
9149	Other Recreation and Vacation Camps	194	79	13	5	0	16	307
		63.19%	25.73%	4.23%	1.63%	0.00%	5.21%	100.00%

Source: Statistics Canada, Business Register, Table 07, Cycle 201, Province by Employment Size and SIC 80.

Table III

Selected Ontario Tourism Industries By SIC80 and Size

SIC code	Industry	Number of Employees in Establishments						
		0 - 9	10-49	50-99	100-499	over 500	unknown	TOTAL
9211	Restaurants, licenced	3570	3338	483	139	6	295	7831
		45.59%	42.63%	6.17%	1.77%	0.08%	3.77%	100.00%
9212	Restaurants, unlicensed	3760	1298	152	67	9	248	5534
		67.94%	23.46%	2.75%	1.21%	0.16%	4.48%	100.00%
9213	Take Out Food Service	3604	973	43	16	0	295	4931
		73.09%	19.73%	0.87%	0.32%	0.00%	5.98%	100.00%
9214	Caterers	862	194	31	24	9	67	1187
		72.62%	16.34%	2.61%	2.02%	0.76%	5.64%	100.00%
9221	Taverns, Bars & Nightclubs	504	348	23	4	0	61	940
		53.62%	37.02%	2.45%	0.43%	0.00%	6.49%	100.00%
9621	Regular Motion Picture Theatre	70	136	7	0	0	46	259
		27.03%	52.51%	2.70%	0.00%	0.00%	17.76%	100.00%
9622	Outdoor Motion Picture Theatre	22	19	0	0	0	7	48
		45.83%	39.58%	0.00%	0.00%	0.00%	14.58%	100.00%
9631	Entertainment Production Companies & Art	505	60	1	4	0	64	634
		79.65%	9.46%	0.16%	0.63%	0.00%	10.09%	100.00%
9639	Other Theatrical/Staged Entertainment	133	11	1	3	0	8	156
		85.26%	7.05%	0.64%	1.92%	0.00%	5.13%	100.00%
9641	Professional Sports Clubs	60	21	4	1	2	2	90
		66.67%	23.33%	4.44%	1.11%	2.22%	2.22%	100.00%
9642	Prof. Athletes and Promoters	53	11	0	1	0	1	66
		80.30%	16.67%	0.00%	1.52%	0.00%	1.52%	100.00%

Selected Ontario Tourism Industries By SIC80 and Size

SIC code	Industry	Number of Employees in Establishments						
		0 - 9	10-49	50-99	100-499	over 500	unknown	TOTAL
9643	Horse Race Tracks	343	52	4	9	2	10	420
		81.67%	12.38%	0.95%	2.14%	0.48%	2.38%	100.00%
9644	Other Race Tracks	61	15	2	0	0	3	81
		75.31%	18.52%	2.47%	0.00%	0.00%	3.70%	100.00%
9651	Golf Courses	203	208	32	17	0	11	471
		43.10%	44.16%	6.79%	3.61%	0.00%	2.34%	100.00%
9652	Curling Clubs	122	18	3	0	0	3	146
		83.56%	12.33%	2.05%	0.00%	0.00%	2.05%	100.00%
9653	Skiing Facilities	47	23	8	6	0	2	86
		54.65%	26.74%	9.30%	6.98%	0.00%	2.33%	100.00%
9654	Boat Rentals and Marinas	356	71	2	5	0	13	447
		79.64%	15.88%	0.45%	1.12%	0.00%	2.91%	100.00%
9692	Amusement Park, Carnival & Circus Operat	92	33	7	7	3	4	146
		63.01%	22.60%	4.79%	4.79%	2.05%	2.74%	100.00%
9695	Roller Skating Facilities	14	12	0	0	0	2	28
		50.00%	42.86%	0.00%	0.00%	0.00%	7.14%	100.00%
9696	Botanical & Zoolological Gardens	7	5	0	5	0	0	17
		41.18%	29.41%	0.00%	29.41%	0.00%	0.00%	100.00%
9699	Other Amusement & Rec. Services n.e.c.	613	97	11	26	15	50	812
		75.49%	11.95%	1.35%	3.20%	1.85%	6.16%	100.00%
Total Establishments by size groupings		19771	6943	814	334	46	1192	29100
		67.94%	23.86%	2.80%	1.15%	0.16%	4.10%	100.00%

TABLE IV

Direct Employment in Ontario by Region, 1982
(Person Years)
TOTAL EXPENDITURE

	Region							
Expenditure Sector	South West Ontario	Festival Country	Georgian Lakelands	Metro Toronto	Central Ontario	Ontario East	Ontario North	Total
Transportation	3,206	5,068	1,705	9,648	2,168	4,844	2,841	29,481
Retail Trade	9,940	10,699	4,380	14,078	4,758	9,423	7,284	60,562
Amusement & Recreation	1,791	3,330	913	3,092	1,405	1,177	1,079	12,788
Accommodation & Food	11,811	18,607	10,158	22,778	12,833	13,637	11,798	101,622
Total	26,748	37,705	17,157	49,596	21,164	29,081	23,002	204,453

Source: Ontario Study of the Service Sector, 1986

TABLE V

TOURISM ASSOCIATION REGIONS

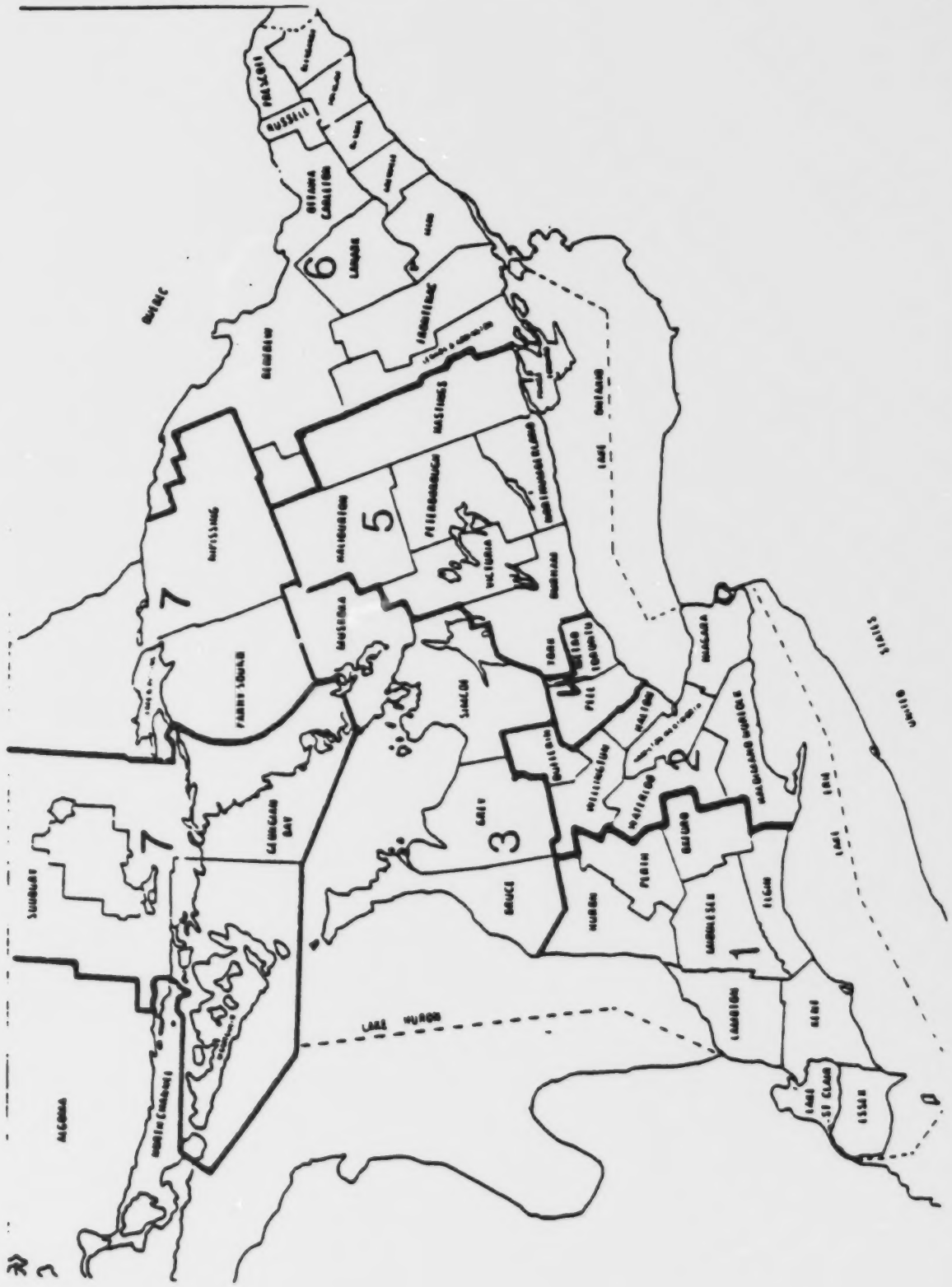

TABLE V

TOURISM ASSOCIATION REGIONS

Travel Association Areas

1. Southwestern Ontario
2. Festival Country
3. Georgian Lakelands
4. Metropolitan Toronto
5. Central Ontario
6. Ontario East
7. Ontario North

TABLE VI

1983	Canadian-Owned	Foreign-Owned	Total
Hotels and Motels	2,591	8	2,599
Lodging Houses & Residential Clubs	94	0	94
Camping Grounds & Trailer Parks	826	2	828
Restaurants, Caterers & Taverns	11,005	17	11,022
Air Transport	196	4	200
Services Incidental to Air Transport	102	5	107
Railway Transport	24	6	30
Water Transport	71	10	81
Services Incidental to Water Transport	58	6	64
Bus Transport, Interurban and Rural	40	2	42
Urban Transit Systems	23	1	24
Taxicab Operations	547	0	547
Motion Picture Theatres	136	6	142
Theatrical and Other Staged Services	392	0	392
Miscellaneous Amusement and Recreation Services	2,491	3	2,494
General Merchandise Stores	1,577	9	1,586
Gasoline Service Stations	4,057	10	4,067
Shoe Stores	614	5	619
Men's Clothing Stores	866	1	867
Women's Clothing Stores	1,563	2	1,565
Clothing & Dry Goods Stores, miscellaneous	1,391	2	1,393
Drug Stores	1,488	3	1,491
Book & Stationery Stores	497	5	502
Jewellery Stores	835	1	836
Liquor, Wine & Beer Stores	13	0	13
Tobacconists	182	1	183
Retail, Miscellaneous	5,962	28	5,990

Source: Statistics Canada Special Data.

APPENDIX 2

TABLE I Occupational Categories in the Accommodations and Food Industry

TABLE II 1985 Wage and Salary Rates of Foodservice Employees by Occupation, Gender and Average Wages

TABLE III 1985 Wage and Salary Rates of Selected Occupations of Hotel and Motel Employees, by Occupation, Gender and Average Wages

TABLE I
OCCUPATIONAL CATEGORIES IN THE ACCOMMODATION AND FOOD INDUSTRY

FOODSERVICE From the Canadian Food and Restaurant ,1987 Salary/Wages and Benefits.

Management Category
- Unit Manager
- Food and Beverage Manager
- Assistant Manager
- Kitchen / Shift manager
- Dining Room Manager
- Banquet/Catering Manager
- Purchasing Manager
- Maitre d'Hotel
- Bar Manager

Trade Category
- Executive / Head Chef
- Sous Chef
- Saucier
- Salad Chef
- Grill Cook
- Prep Cook
- Short Order Cook

Service Category
- Bartender
- Bar Assistant
- Head Waiter
- Waiter / Waitress
- Cashier
- Cafeteria Attendant / Counter Worker
- Bus Person
- Dishwasher
- General Help

ACCOMMODATION -Abstracted from Commonwealth Hospitality (Holiday Inn, BestWestern)

Administrative
- General Manager
- Human Resource Manager
- Controller
- Director of Sales
- Sales Manager
- Senior Secretary
- Intermediate Secretary
- Clerk Typist
- Jr. Clerk Typist

Accommodation Management
- Guest Service Manager
- Asst. Guest Service Manager
- Front Desk Clerk
- Front Desk Shift Supervisor
- Night Audit
- Switchboard Operator
- Night Switchboard Operator
- Bell Captain
- Bell Persons
- Reservations

Housekeeping
- Housekeeper
- Asst. Housekeeper
- Inspectress
- Maids
- Night Maid
- Housemen
- Night Cleaner
- Laundry

Security and Maintenance
- Doorman
- Driver
- Security Supervisor
- Security Officer
- Maintenance
- Asst. Maintenance Manager
- Maintenance Manager
- Painter
- Parking Lot Supervisor
- Parking Lot Attendant

TABLE II

1985 Ontario Wage and Salary Rates of Food Service Employees by Occupation, Sex and Average Wages

HOTELS AND MOTELS

OCCUPATION	EMPLOYEES			AVERAGE WAGES	
	Female	Male	Total	Female	Male
Baker	19	32	51	8.02	9.51
Bartender	208	302	510	5.55	6.17
Bellman/woman	-	217	221	-	4.92
Beverage Waitstaff	329	76	405	4.12	4.58
Captain Waitstaff	79	85	164	6.59	6.65
Chef-Cook, General	241	362	603	6.18	7.45
Chef, Entremeter	14	14	28	6.30	8.03
Pastry Chef	14	21	35	6.13	9.14
Short-Order Cook	-	21	22	-	9.03
Sauce Chef	5	33	38	9.42	9.40
Fry Cook	30	71	101	5.93	7.27
Kitchen Helper	248	374	622	5.23	5.42
Sous Chef	14	100	114	7.55	11.43
Tapman/woman	-	12	16	-	5.70
Waitstaff	1293	619	1962	4.24	4.49

RESTAURANTS

OCCUPATION	EMPLOYEES			AVERAGE WAGES	
	Female	Male	TOTAL	Female	Male
Attendant(take out service)	489	251	740	4.43	4.08
Bartender	176	303	479	4.68	5.47
Bussers	194	563	757	4.02	4.07
Cashier	2,298	385	2,683	4.68	3.85
Chef-Cook General	310	1,383	1,693	5.79	5.69
Food Assembler	234	311	545	4.16	3.77
Host,Rest.or coffee shop	244	62	306	5.32	6.46
Kitchen Helper	582	531	1,113	4.53	4.08
Kitchen, stock clerk	5	27	32	4.86	6.39
Pot Washer	154	415	569	4.73	4.50
Salad/dessert maker	387	144	531	5.05	5.40
Short-order cook	399	581	980	4.55	4.64
Sous-chef	31	161	192	6.83	9.01
Waitstaff	2,087	683	2,770	3.80	3.78

TABLE III

1985 Ontario Wage and Salary Rates of Accommodation Employees by Occupation, Sex and Average Wages

HOTELS AND MOTELS					
OCCUPATION	EMPLOYEES			AVERAGE WAGES	
	Female	Male	Total	Female	Male
Bellman / woman	-	217	217	-	4.92
Carpenter, Maintenance	-	44	44	-	9.41
Cleaner, room	1539	10	1549	5.77	5.40
Electrical Repairer	-	43	43	-	8.96
Executive Housekeeper	111	-	111	8.15	-
Hotel Clerk	393	223	616	5.83	6.50
Houseman / woman	82	278	360	5.41	6.17
Laundry Attendent, heavy duties	130	16	146	5.20	6.38
Laundry Attendent, light duties	100	17	117	6.15	6.00
Seamstress / ster	28	-	28	6.46	-
Telephone Operator	105	7	112	248. Weekly	248.

APPENDIX 3

SOURCES OF INFORMATION

SOURCES OF INFORMATION IN THE TRAVEL INDUSTRY

TRAVEL AGENCIES

1. Surveys and Studies

- ACTA/ Courier Advisory Panel Survey of Canadian Travel Agencies, 1987.
- Laventhol and Horwath Consultants have done several studies of this industry but this researcher was unable to access them.
- Travelweek survey of employers, consultants and managers in travel agencies, 1986.

2. Associations

- TBTA, Toronto Business Travel Association.*
- ACTA, Alliance of Canadian Travel Associations.*
- CITC, Canadian Institute of Travel Counsellors.*
- American Society of Travel Agents.
- PADA, Pacific and Asia Travel Association.
- CLIA, Cruise Line International Association.
- SACA, South and Central America Associations.
- IATA, International Alliance of Travel Associations.

3. Educational and Governing Bodies

- Travel Registrar for Ontario, Ministry of Consumer and Corporate Relations*.
- Seneca College Travel and Tourism Department.*
- Canadian Travel Press.*

4. Establishments

Personal interviews were conducted with six agencies, one each of a large and smaller retailer, a large and small wholesaler and one specialized agency.

TOURISM ASSOCIATIONS

1. Studies or Surveys - none found

2. Associations - 11 associations were interviewed concerning their staff and finances.

- Canadian Society of Association Executives (not interviewed)

3. Government - 3 people from the Ministry of Tourism and Recreation were interviewed.

CONVENTION, VISITOR AND TOUR ORGANIZATIONS (private)

1. Studies or Surveys

None in Canada but some conducted in the U.S.

2. Associations

- Meeting Planners International
- Canadian Association of Exposition Management
- Special Event Management Association

3. Establishments

Three private convention planning companies were interviewed confidentially.

SOURCES OF INFORMATION IN THE ACCOMMODATION AND FOOD INDUSTRY

1. Surveys and Studies

- Ontario Study of the Service Sector, Ontario Ministry of Treasury and Economics, !986
- 1985 Wage Rates, Salaries and Hours of Labour, (for Ontario) Labour Canada
- 1987 Salary/Wages and Benefits in the Canadian Restaurant and Foodservices Industry
- 1987 Executive Compensation in the Canadian Restaurant and Foodservices Industry
- Canadian Tourist Research Institute, Employment Profile of the Accommodation and Food Industry

2. Associations (personal interviews)

- Canadian Restaurants and Foodservices Association
- Ontario Restaurant Association
- Canadian Hotel Marketing and Sales Executives
- Ontario Hotel and Motel Association
- The Hotel Employees' Restaurant Employees' Union, Local 75

3. Establishments

- One large hotel and three chains (head office plus one site)
- One chain restaurant and one holding company for six restaurants
- MacDonald's declined to participate
- Four independent restaurants; one owner, one host and 6 waiters.
- Experience from telephone survey of approximately 40 telephone interviews to small, medium and large sized restaurants in Ontario 2 years ago.

SOURCES OF INFORMATION FOR
MUSEUMS, ART GALLERIES AND ARCHIVAL ORGANIZATIONS

1. Surveys and Studies

Currently, the best source of information on museums is a Labour Market Study in the Museum Sector, commissioned by Communications Canada and conducted by Ekos Research Associates Inc. and Lord Cultural Resources Planning & Management Inc. Permission to review the CMA report in draft form was given by Dr. M. Malik of Communications Canada, in telephone conversation, September 25,1988. The study was a quantitative and qualitative national study and should be published in late 1988 or early 1989. Other studies are:

- Professional Directions for Museum Work in Canada: An Analysis of Museum Jobs and Museum Studies Training Curricula (1978). Lynn Teather, Coordinator of M.A. in Museology at U. of Toronto.
- The National Salary Study. Thorne, Stevenson and Kellogg (1983).

2. Ontario Associations

- Canadian Artists' Representation Ontario
- Costume Society of Ontario
- Ministry of Citizenship and Culture*
- Ontario Archaeological Society
- Ontario Arts Council
- Ontario Association of Art Galleries*
- Ontario Geneological Society
- Ontario Heritage Foundation
- Ontario Historical Society
- Ontario Museum Association*
- Ontario Society for Education Through Art
- Ontario Society for Industrial Archaeology
- Toronto Area Archivists Group
- Toronto Area Conservation Group

* Interviews conducted with these associations.

Specific Contacts Made for Information in this section

In addition to reviewing the extensive CMA survey, interviews were conducted (by phone or in person) with personnel and curator / managers at a sampling of large and small,

government-sponsored and private, non-profit community based museums and galleries.Ministry of Citizenship and Culture staff also were good sources of information on the structure, funding and employment patterns in museums and cultural centres as majority receive grants and various types of funding from the provincial government. Information on the proportion of female and male employees (factual and opinion estimates) was only available from the individual establishments studied in this and the CMA study as the Standard Industrial and Occupational Codings amalgamate museums, art galleries and archives and their employees with librairies and their staff.

Museums:	The Royal Ontario Museum Huronia Museum Grey County Museum
Government:	Ministry of Citizenship and Culture • Cultural Industries and Agencies • Historical Resources and Museums • Heritage Institutions Canada Council Communications Canada Statistics Canada, Survey of Heritage Institutions (E.Dugas,613-951-1568*
Associations:	The Canadian Museum Association The Association of Cultural Executive The Ontario Association of Art Galleries
Consultants:	Lord Cultural Resources Planning & Management

SOURCES OF INFORMATION IN THE THEATRE INDUSTRY

- The Directors' Guild of Canada*
- PACT, Professional Association of Canadian Theatres*
- Actors Equity
- IATSE, International Association of Theatre and Stagehands Equity
- Theatre Ontario (association of community theatres)
- Statistics Canada, Performing Arts Survey (Mary Cromie, 613-951-6864)*

*interviewed for this study.

SOURCES OF INFORMATION IN THE ATTRACTIONS INDUSTRY

1. Survey and Studies

- Annual Survey of Amusement and Recreational Services, Statistics Canada. Contact Shirley Beyer, (613) 951-3492 (no information on specific occupations, gender or wage rates by occupations.)

- Ontario Ski Resorts Associations conducted a wage and salary survey and shared it in confidence.

2. Associations

- Attractions Ontario (interviewed and received list of members)
- CUPE (Metro Toronto Zoo)
- OPSEU (NIagara Parks Commission)
- Tourism Associations like Tourism Ontario, OTAPs, and regional tourism groups.

3. Establishments

Twenty attraction establishments were contacted for basic information on number of staff, gender ratios, wage rates, full- and part-time ratios, job evaluations, human resource policies and pay equity. Two large attractions, Canada's Wonderland and Marineland, said it would take too much work to pull this information. With some others, it was found that they were either government agencies or closely lined to public policies by the nature of their funding.

APPENDIX 4

INTERVIEW

QUESTIONNAIRES

TOURISM QUESTIONNAIRE / SUMMER 1988
SURVEY OF RELATED ASSOCIATIONS

ASSOCIATION_____
NAME_____TITLE_____
ADDRESS_____
_____
PHONE:_____NO. OF EMPLOYEES_____
Information to be kept confidential ? Yes_____ No._____

Association: No. of Assoc. Members. ____
Province Wide? ____
No. of Provincial chapters? ____
National? ____

Industries Represented_____
_____
_____
_____

My understanding of the industry you represent is as follows:

	Yours	Theirs
Average size or scope of businesses	_____	_____
Percentages of men/women	_____	_____
Percentage full-time/part/seasonal	_____	_____

Other

Notes from "fuller picture"

Historical development (big/small businesses; specific big players; other forces shaping development)

Future Challenges (technology, free trade, overseas competition, etc.)

Financial Structure of Industry

a) Major costs in industry

b) What percentage of costs is:

Food _____
Labour _____
Materials_____
Other _____
Other _____
Other _____

c) Most prevalent reasons for company closings?

d) Frequency of company failures._____

e) How much of an element of risk is there in this industry?(eg. Restaurants seem to be high risk)

Employee Associations (unions involved, associations, and size)

Wage Structure

a) High/Low wage industry?(eg. of MacDonald's have a great proportion of staff at low wage, front line jobs vs consulting companies with high proportion of high wage staffs.)

Estimate of percentage of workers at:

Minimum Student Wage	____
Minimum Wage	____
1 - 3 dollars/hr higher	____
20 - 25,000/yr	____
25 - 35,000/yr	____
35 - 45,000/yr	____
over 45,000/yr	____

b) Estimate percentage of worker who are:

Full time	____
Permanent part-time	____
Seasonal full-time	____
Seasonal part-time	____
Contract	____
Students	____
Shift work	____
Other _____	____
Other _____	____

GO TO NEXT PAGE ON OCCUPATIONS

WRAP - UP Have you thought of how Pay Equity might affect your association members?

TOURISM QUESTIONNAIRE / SUMMER 1988
SURVEY OF RELATED EMPLOYERS (Phone Survey)

COMPANY _____
NAME_____TITLE_____
ADDRESS_____
_____
PHONE:_____
Information to be kept confidential ? Yes_____ No._____

COMPANY No. of Employees ____
Sole owner ____
Part of Chain____ No. of Provincial sites ____

Historical development (from small start or other co.; other forces shaping development)

Employee/Employer Associations (unions involved, associations, and size)

Financial Structure of Company (best understanding of how business really works)
a) What would you estimate to be the major costs in your company?

AREA	ESTIMATED PERCENTAGE
Labour	

b) Most prevalent reasons for company closings in your industry?
c) How much of an element of risk is there in this industry?(eg. Restaurants seem to be high risk)

Employment practices
Any difficulty getting workers?

Any benefits or perqs to keep or reward EE's.

Do EE's view their work as a job or a step on a career path?

OCCUPATIONS What jobs are included in your company?

Job title (class)	No.	M/F	wage range	recruit
1.		/		
2.				
3.				
4.				
5.				
6.				

Wage Structure

Estimate of percentage of workers at:

Minimum Student Wage	____
Minimum Wage	____
1 - 3 dollars/hr higher	____
20 - 25,000/yr	____
25 - 35,000/yr	____
35 - 45,000/yr	____
over 45,000/yr	____

b) Estimate percentage of worker who are:

Full time	____
Permanent part-time	____
Seasonal full-time	____
Seasonal part-time	____
Contract	____
Students	____
Shift work	____

Future Challenges

What do you see as the future challenges to keeping your business healthy and growing? (eg.technology, free trade, overseas competition, etc.)

WRAP - UP Have you thought of how Pay Equity might affect your company?

Comments you wish taken back to the Pay Equity Commission?

Do you want information on Pay Equity mailed to you?Yes___ No___

Followup Needed?

OCCUPATIONAL REPRESENTATION

JOB TITLE	CLASSIF	M / F	WAGE AVER	RECRUIT	JOB/CAREER	LGTH SERVICE	DEMOG
1							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							

APPENDIX 5

SUMMARY AND OPTIONS CONCERNING PAY EQUITY

SUMMARY AND OPTIONS CONCERNING PAY EQUITY IN THE TOURISM INDUSTRY

Tourism is defined and described differently by various government, interest and industry groups. One cannot deal with the industry as a whole on issues of employment or salary because of the disparity in functions, purpose and financial basis of the industries it is supposed to encompass.

Of the industries researched for the present study, only a few could be considered gender predominant --- Travel Agencies, Tourism Associations, Museums, Art Galleries and Restaurants. Even within these industries there are many establishments which are either gender equal or male predominant (except travel agencies). The issue of gender predominance then becomes related more to each establishment rather than to the industry as a whole, and as such, may be considered more of an access, or employment equity, issue than one of pay equity. This was especially true where restaurants were concerned. In any one establishment the waitstaff was usually all male or all female, and because this is the predominant occupation the gender ratio of the operation would be swung accordingly.

OPTIONS

Small, For Profit Establishments

Considering the small, for profit establishments in female predominant industries in light of the current Pay Equity Legislation, some major differences among the industries may be pertinent. The low wages in travel agencies and restaurants appear to be tied into the high risk and low profit margins of the respective industries but are also fueled by the amount of inexpensive female labour available. As the majority of the establishments employ under 10 people, pay equity adjustments, under the current legislation, will not be required for those at greatest risk by virtue of them being part of these industries. This situation may resolve

itself as there are other pressures arising that promise to have the desired effect of increasing wages. New travel legislation will weed out the unscrupulous operators and increase the professionalism of the industry, which in turn should improve the management of most operations.Good management is seen as the best way to build profits in travel, but also generally in small establishments. Already many restaurants are starting to pay above minimum wage because of the shortage of available labour, especially in smaller centres. There is very little that can be done to address the higher gratuities earned by men waitstaff because they are more often employed in higher level, or more expensive, restaurants. Yet, as mentioned, women often make as much money in lower level restaurants because of the higher turnover of patrons. However, employment equity is the key issue in helping women gain access to professional and management occupations within the hotel and foodservice industries, and to gain equal access to the high level waiting jobs .

Large, For Profit Establishments

The larger retail and wholesale travel agencies pose more of a problem. Due to the size of these organizations they will have to post pay equity plans but there are few, if any, comparators below management or in other comparable establishments in the travel business. Therefore, there are no low paid men, or proxies in similar organizations, to serve as comparators. Large foodservice operations do have men at all levels of responsibility and wages, and many comparators in other establishments so that the present legislation should be able to modify any wage injustices or be able to find a satisfactory solution in the event of a complaint.

Non-profit Industries

Many of the non-profit establishments will not be included in current legislation due to their small size. The larger ones tend to be government-affiliated and will make adjustments in connection with their governing body. In the smaller

situations, up to 90 or 100% of funding may come from one or all of three levels of government. Much of this money is dedicated to the central purpose of the establishment such as the acquisition of art or museum collections.

It is recommended that where provincial funding is a major supporter of a non-profit establishment that compliance to pay equity issues be a basis for funding. Some people thought that this would create too much paperwork and small operations with private boards would go without the funding instead of complying to this type of request. Small operations could be aided in getting the process of job evaluations in place by special grants solely for this purpose and government consultants could provide assistance free of charge to alleviate undue hardship. It is expected that if the budget has to expand to pay better wages, the fundraising will be able to adjust its activities and priorities to cover this much needed change.

Attractions are so different from each other, general comments concerning pay equity are difficult to make. A very high proportion of the employees are students working during their summer holidays, and as such are exempt from pay equity laws. The same problem exists for many summer resort hotels and lodges. Where there are sufficient full-time, year round staff to fall within in the jurisdiction of the present pay equity legislation, there should be enough comparators at all levels or at least some low-wage males to align to high-wage males in order to assess whether or not the women between these two extremes are receiving appropropriate wages.